

Harvest Report *2021*

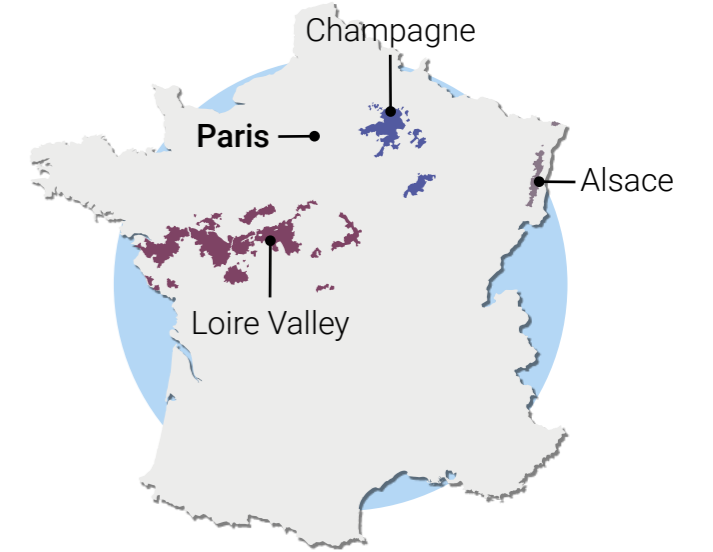


France

Total production will be down by around 25% compared with 2020 and 18% lower than the 5 year average so one of smallest harvests for several years - a climatic mix of late frosts, hail, drought, excessive humidity and a cool, wet summer in some regions all contributing to the decline. Shortages in particular of whites across France but quality in many regions already appears good with a balance and freshness lacking in some 2020 wines.

 DOWN
  MAY
  APR

Loire Valley, Champagne and Alsace



1 | Loire Valley

 DOWN
  UP
  AUG/SEPT
  APRIL (FROST)
  JUNE (HAIL)




The spring frosts hit the majority of the region and then summer was humid, rainy and much cooler than usual so production of Sauvignon Blanc has declined sharply but quality still seems good. The end of the growing season, in August and September, has allowed for a very good level of ripeness whilst retaining freshness but no miracle in terms of yield. Wines will be fresh, aromatic and intense, a classic Loire vintage.

2 | Champagne

 DOWN
  UP
  APR

Two nights of frost in early April caused widespread damage to the vine buds in Champagne, with estimated crop losses ranging from 20% to 80%. With temperatures plunging to as low as -8°C in some parts of Champagne in the early hours of 7th April, any green shoots were damaged by the freezing conditions, along with dormant buds. In particular the warmer, more southerly Aube sub-region of the appellation, where the vines were more advanced, suffered badly.

3 | Alsace

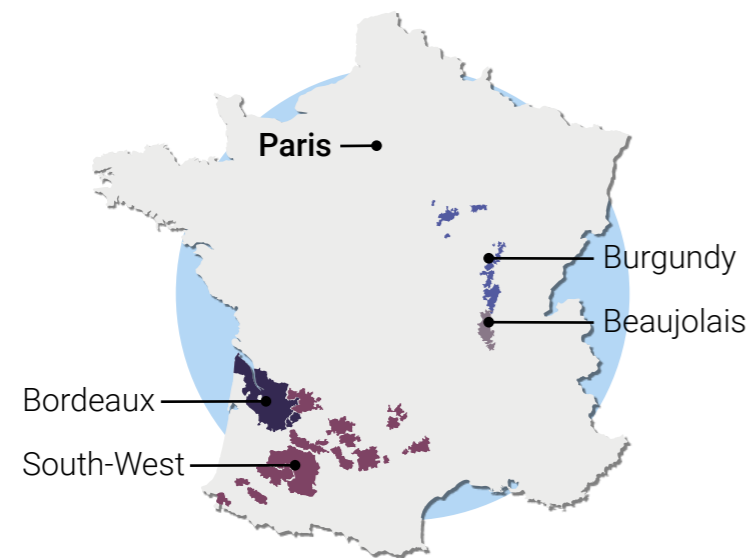
 DOWN
  UP
  JULY/AUG

In Alsace, the harvest took place in October and in good conditions. Fortunately Alsace was not affected by the late Spring frosts, however, the wet summer and high levels of humidity have caused some issues with mildew for Pinot varieties in particular. Careful sorting will minimise the effect and decent volumes of 2020 vintage will balance any declines in 2021.



KEY

 VOLUME V 2020
  COST
  HOT/DRY
 RAINFALL
  FROST/HAIL
  STORMS



Bordeaux, South-West, Burgundy and Beaujolais

4 | Bordeaux

DOWN € UP MAY/JUNE

Spring was particularly wet, bringing with it the severe threat of downy mildew, with notably strong mildew pressure on the grape clusters themselves. Frequent and heavy rain persisted throughout the season for many. The result of which was a cooler-than-average growing season, with slow, steady ripening, has many optimistic.

5 | Dordogne & South West

DOWN € UP

In the rest of the Southwest, the spring frost, the coulure, millerandage and disease reduced the production potential. Lot, Landes and Haute-Garonne are the most impacted. In the Gers, some late rain has helped increase volumes but sourcing from this key region for house wines will be challenging.

6 | Burgundy

DOWN € UP MAY APRIL

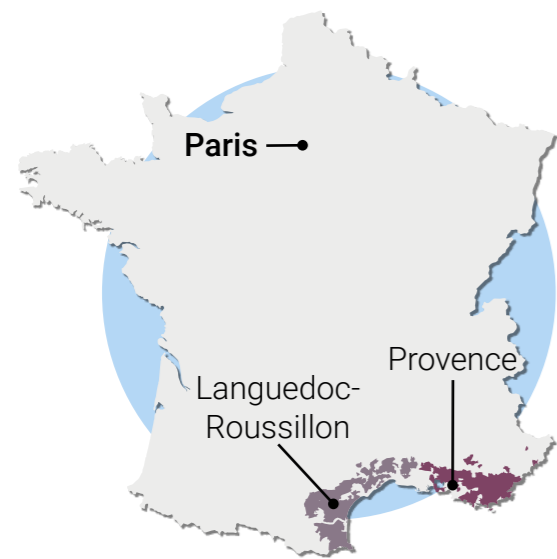
With early budburst after a relatively warm March, Chardonnay was the most affected by the frosts in April which caught the breaking young leaves and buds, and the unsettled, cool weather which followed meant that many bunches did not develop well so second shoots failed to materialise. Harvest for reds started almost a month later than 2020 due to the very slow ripening after a much cooler than average summer.

7 | Beaujolais

DOWN € UP APRIL

2021 was a complicated year both in terms of the weather conditions and the amount of work needed in the vines by the winegrowers. A vintage of spring frost and localised hail but decent weather in the second half of August and September made it possible to harvest decent quality grapes. This resulted in wines that are clean and attractive with good acidity but limited in volume.





Languedoc-Roussillon and Provence

8 | Languedoc-Roussillon

📉 DOWN € UP ❄️ APRIL

In Languedoc and Roussillon, the volumes have been affected by lengthy periods of drought and unusually damage from spring frosts here too, particularly in the Hérault. Forecasts approaching the end of the harvest were for production in this large region to be at least one-third lower than in 2020.

9 | Provence

📉 DOWN € UP

For Provençal vineyards that were able to harvest, the fruit is generally healthy, though vineyards presented ripening disparities and potentially lower yields. Add to that a wildfire that raged for a week right before harvest in the Var, spreading via strong winds exacerbated by dry conditions. Nearly 7,100 hectares (17,500 acres) of land is now damaged, affecting around 73 wineries and 5 cooperatives. Other areas are fine, with winemakers reporting their rosés already have intense aromas of white peach and grapefruit, balance, and freshness, and they have more grapes than expected.



Northern and Southern Rhône

10 | Northern Rhône

📉 DOWN € UP ☀️ AUG/SEPT ☁️ MAY/JUNE

During May and June the weather alternated between sunny spells (very beneficial) and sunny weather. The flowering took place in very good conditions. July and August were quite humid, followed by a much needed hot and dry period, just before harvest.

11 | Southern Rhône

📉 DOWN € UP ☀️ JULY/AUG ☁️ SEPT ❄️ APR

A real tricky vintage, 2021 beginning with a frost across the Rhône valley. The area not affected however will still yield decent volumes. Achieving ripeness was difficult in some places and damage to the grapes by rain during harvest has caused some outbreaks of rot. Work in the vineyard by skilled vigneron and winemakers was very important this year to assess and pick the crop at the optimum time.

Italy

The 2021 harvest in Italy kicked off more than seven days earlier than 2020, in the south and around 10 days late in the north. Production is said to be down, by about 9%. For some this was an excellent harvest, for others extremely challenging. Late frosts had a profound effect in some areas, especially in the centre north, and the extreme summer temperatures and lack of precipitation were particularly felt in the south, the north much less so. Italy's production in 2021 has not suffered too greatly compared to some other European countries, but nevertheless was down 9% compared to 2020. For now, the only certainty is that there will be an increase around 5% to 25% across the country due to small vintage and higher dry goods costs.

📉 DOWN ☀️ JULY/AUG ❄️ APR

	2020	2021	Variance
Piemonte	2.7	2.433	-10%
Lombardia	1.54	1.23	-7%
Trentino Alto Adige	1.29	1.1	-20%
Veneto	11.7	10.8	-10%
Emilia Romagna	7.89	6.7	-15%
Toscana	2.2	1.65	-25%
Umbria	378	312	-18%
Marche	889	778	-13%
Abruzzo	3.4	2.8	-18%
Puglia	9	8.5	-5%
Sicily	3.66	3.98	9%
Sardinia	475	404	-10%

Piemonte and Lombardia



1 | Piemonte

📉 DOWN € STABLE/UP ☀️ MAY/JUNE ❄️ APR

After a cold and snowy winter, a mild spring followed. The April frosts had a profound effect, but this differed sharply from valley to valley and grower to grower. A cool, dry May was followed by a warm June, limiting any disease pressure. Hail was a particular problem in the Roero and Alto Piemonte areas. Increases vary, with Gavi seeing increases of 5-10%, Barolo around 10%, and Barbera prices looking stable.

2 | Lombardia

📉 DOWN € UP ☀️ JUNE

Significant spring frosts reduced the crop across the region. Summer was warm and dry and, apart from some hail damage in June, ripening took place in good conditions. Harvest began in mid August for sparkling wines, a week later than average. A small crop of healthy grapes, good to excellent quality expected.

Veneto and Trentino



3 | Veneto

DOWN € UP APR

In the Veneto, after a week of daytime temperatures nearing 27 °C, the cold spell came as a total shock to vineyards and fruit trees, with temperatures in Soave dipping below -5 °C, while the plains around Verona experienced temperatures of -3 °C for five nights in a row. Heavy spring frosts in many areas, the Prosecco zone in particular, have resulted in a reduced crop and higher prices for many wines, including Prosecco, Pinot Grigio and Amarone.

4 | Trentino

DOWN € STABLE JULY

Effects of the extreme weather phenomenon have had less effect here than expected, in part due to the delays in the vineyard cycle (late budding and flowering etc). However, the Trentino area was particularly affected by hail. Despite the reduced crop, Trentino pricing is more stable than Veneto though Sauvignon and Pinot Nero have increased due to high demand.



Marche, Abruzzo and Tuscany



6 | Marche

UP JAN/FEB APR

Despite ample rainfall during winter, spring was much drier and cooler than the norm. Frosts were keenly felt here too, although hillside vineyards were largely unscathed. This region was particularly dry going into the summer heat which exacerbated the problem. The quality will be good where irrigation was used but quantities will vary from grower to grower.

7 | Abruzzo

DOWN € STABLE/UP JUNE/JULY/AUG

After a wet winter and warm spring, the cold snap arrived in late April but with little serious effects. The summer heat of June, July and August caused some problems of drought and water stress, especially on hillside vineyards. A small, good quality harvest, especially for reds.

8 | Tuscany

DOWN € UP AUG APR

This will be a complex and challenging vintage for most. The frost was deadly this year because a warm March sparked many vines to start growing early. This was followed by a hot, dry summer which caused water stress and heat damage and further reduced yields. More moderate weather returned in September giving a generally healthy crop of good quality, especially for reds.



Campania, Puglia and Sicily

9 | Campania

UP € STABLE ☀️ MAY/JUNE ☁️ JULY ❄️ APR

The April cold snap which followed a mild and rainy winter and spring, caused few problems. In fact, this was a very favourable vintage, despite the summer heat and dryness, due to the rains that occurred in late July, giving welcome relief.

10 | Puglia

DOWN € UP ☀️ JULY/AUG

This vintage will be shaped by the drought conditions that persisted throughout the summer, but in a heterogenous way, depending on the growers' capacity to intervene with irrigation. Primitivo in particular is looking at price increase of around 10%.

11 | Sicily

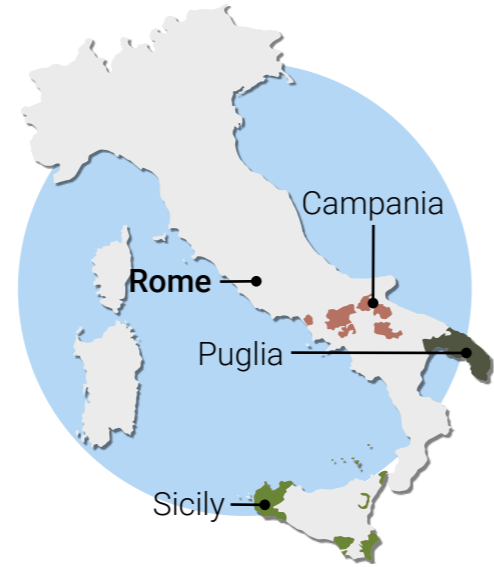
UP € STABLE ☀️ AUG

A regular vintage here too, the winter providing abundant water reserves. A dry spring with cool temperatures was followed by an early summer of usual warmth. August witnessed extremes of heat which broke records. Vineyards clearly experienced hydric stress and heat damage. Towards the end of August temperatures lowered to the norm. The west of Sicily has managed better than other parts where there will be good levels of production and quality. Sicily logged the highest temperature observed in Europe since records began: 48.8°C, near the town of Siracusa. But overall a positive view remains.

12 | Sardinia

DOWN € STABLE ☀️ JUNE/JULY

Rainy winter filled the aquifers but unfortunately, the spring frosts were particularly felt, especially for Vermentino. A dry and hot summer followed, which favoured an absence of disease and good quality where irrigation was possible, especially for the reds (Cannonau and Carignano)



Spain & Portugal

Spain

Good rainfall just after last year's harvest and snow on high ground pre-Christmas ensured a replenished winter water level so a strong starting point for 2021 growing season. However in some areas from February the weather was very dry until June/July when summer storms moved across Spain from the Atlantic. More storms in autumn helped plump up the grapes but also delayed the harvest in some areas. Generally volumes around average with exceptions in some regions of the north but an overall decline of 15% versus the very large harvest of 2020.

DOWN ☀️ APR/MAY ☁️ JUNE/JULY

Portugal

Mild conditions throughout the growing season in the Douro so there will be an increase in volume versus 2020. The 2021 ports will be characterised by full flavour, elegance, rich fruit and freshness.

Rioja & Campo de Borja



1 | Rioja

DOWN UP JAN (SNOW) MAY/JUNE (HAIL)

Temperatures remained low during July and early August and coupled with the lack of rainfall have made 2021 an "Atlantic" influenced year in Rioja. The vines developed slowly, allowing for precise canopy management, and green pruning. Some warmth and rain around the harvest has ensured good ripening and picking was later than in 2020. The wines are expressive and fresh, the general impression is that 2021 has the potential to be one of Rioja's great vintages.

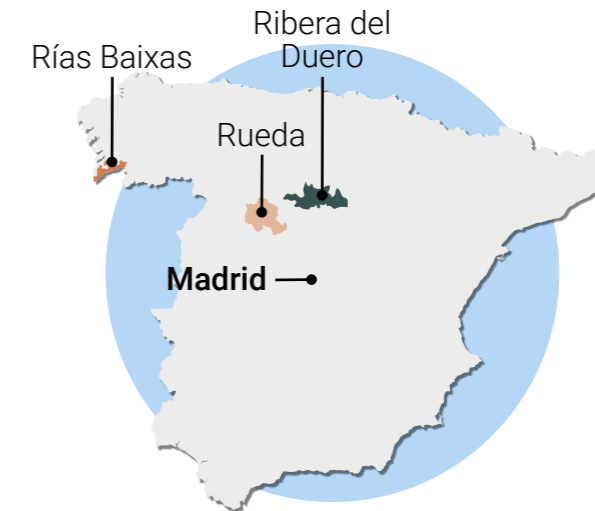
2 | Campo de Borja

STABLE STABLE JUNE

No rainfall from the end of January to early June and more periods of drought up to September will result in a potential reduction of 30% in some areas. Late autumn storms have helped lengthen the ripening and the Cierzo wind which is so important here helps to keep the grapes free of disease so quality of Garnacha will be good.



Rías Baixas, Rueda & Ribera del Duero



3 | Rías Baixas

UP UP

Volumes are similar to last year but demand remains high and continues to grow which is pushing up the price of grapes so unlikely to see any softening of pricing.

4 | Rueda

DOWN UP MARCH APR

A wet spring followed by uneven flowering and some late frosts then a moderate summer but one of the few regions that has suffered less from the lack of rain. Production will still be around 20% less than usual as this year the D.O. told growers in June that the maximum limit of production would be set at 8,500 kg/ha down from 10,000 kg/ha last year. At Bodegas Menade, "the aromatic level is spectacular due, above all, to a mild summer", explains the family, "and the analytical parameters of acidity and PH are better than expected".

5 | Ribera del Duero

DOWN UP/STABLE

Good quality and wines will have good acid balance and freshness but volumes down on normal. Cost increases should be mitigated by some residual stock of 2020 wine



Jumilla, La Mancha & Utiel Requena



6 | Jumilla

DOWN UP AUG

Extremely high temperatures here with several days above 40°C, accelerated the ripening of the earliest varieties. It is estimated that the overall production will be slightly lower than last year, due to localised outbursts of mildew and damage from the extreme heat.

7 | La Mancha

DOWN UP AUG SEPT

La Mancha was affected by the adverse effects of 'Filomena' in January, a situation that was exacerbated by some spring frosts, excessive heat in late August and violent storms plus localised hailstorms in September so volume has been impacted by 15 to 20% versus 2020. Fruit quality good especially Tempranillo and early white varieties such as Chardonnay, Moscatel and Verdejo. Pressure on volume of whites due to shortages in other European countries.

8 | Utiel Requena

DOWN UP SEPT

Heavy rain at the wrong time and then periods of drought have resulted in a volume reduction of 25 to 30%. Grape quality evenso seems good helped by the decision to pick white grapes before autumn rains.



Catalunya



9 | Catalunya

DOWN UP APR/MAY

In terms of the harvest, after several tricky years, with excessive heat in 2019 and mildew in 2020, the 2021 vintage looks to be very good in terms of quality. Penedès is expected to be 20% lower in terms of volume due to drought. Producers in Priorat say that they expect this year's vintage to be the best of the past three years. Overall the volumes are reduced by around 20%, rain during flowering, did not help but otherwise the weather has been good.



England & USA



England

📦 UP £ DOWN ☁️ JULY ❄️ APR

There was a late and slow start to the season with a cold Spring and while some vineyard sites were affected by frost the Hennes site was not impacted, and budburst went well. However, cool weather in May delayed flowering and conditions at the end of June during flowering were characterised by unsettled weather, wind and rain, which came and went along with bouts of warm, dry weather throughout summer. To ensure good yields and clean, quality fruit the team worked tirelessly in the vineyard to open up the canopy, keep weeds down and prevent disease. Veraison started early September with harvest starting around 10 days later than normal on 13th October. The final stages of the growing season were sunny and dry and this helped ripen the grapes over the last few weeks and ensured ideal conditions for harvest. Although ripeness levels are lower than 2020, yields and fruit quality are good and there was good flavour concentration in the grapes. Despite the challenges faced by the season we are excited by how the wines are developing in tank and we look forward to seeing how they develop over the coming months and years.



USA

📦 DOWN \$ UP ☀️ JUNE/JULY/AUG



Drought was causing concern among winemakers in California long before the 2021 harvest began, and initial reports suggest the conditions have cut potential vintage size to varying degrees. The drought has had a severe effect on the crops in the Central Valley, and Lodi's crop is looking to be potentially lighter. Central Coast was impacted by drought and a cool spring and summer which has led to a slower growing season. All in all, winemakers across the regions are singing a similar tune – yields are down, however, the quality of grapes in terms of flavors, concentration, and aromas have been fantastic.

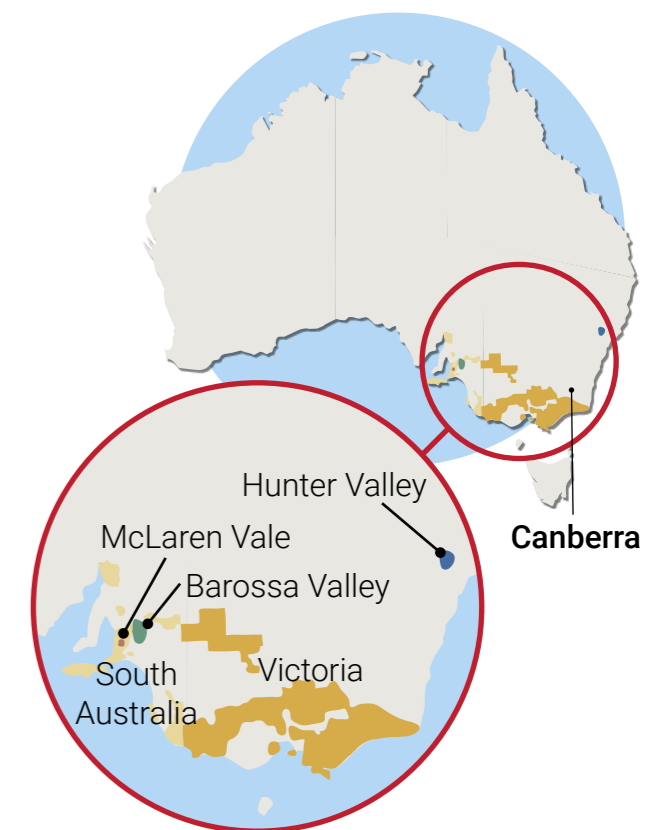
Australia & New Zealand



Australia

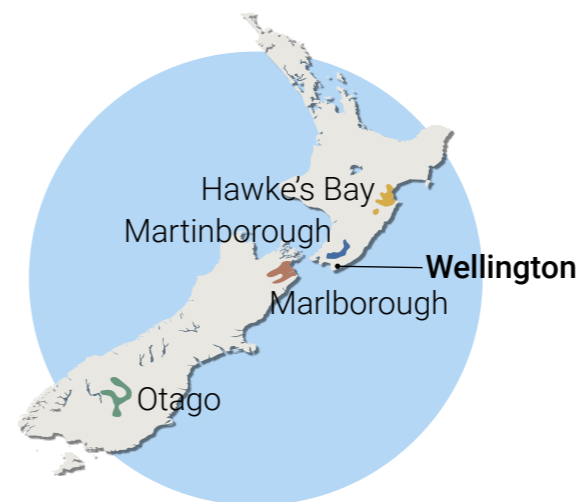
UP UP

Australia's 2021 vintage is the largest in the nation's history of winemaking. The 2020–21 season was a perfect contrast with the previous one. While summer 2019–20 was the second hottest on record, 2020–21 was the coolest in 10 years. Two meteorological phenomena conspired to create the near-perfect 2021 vintage conditions in southern Australia. SAM (Southern Annular Mode) and ENSO (El Niño Southern Oscillation) teamed up to create cooler-than-normal conditions along the southern coast of Australia. Fewer heatwaves and good rain at the right time allowed grapes to ripen optimally. Not only was it a fruitful vintage in terms of volume; the growing season over the course of 2020-2021 was characterised by "near-perfect growing conditions across most states and regions". The main issues in terms of supply are huge demand for all whites, particularly Sauvignon Blanc, Chardonnay and Pinot Grigio due to shortage in New Zealand, Europe and in USA. There is plentiful supply of reds and good quality due to Chinese demand for 90% red wine drying up. So, an oversupply of red wine from vintage 2020 and likely 2021, but the opposite for whites. Yields are up around 30%.



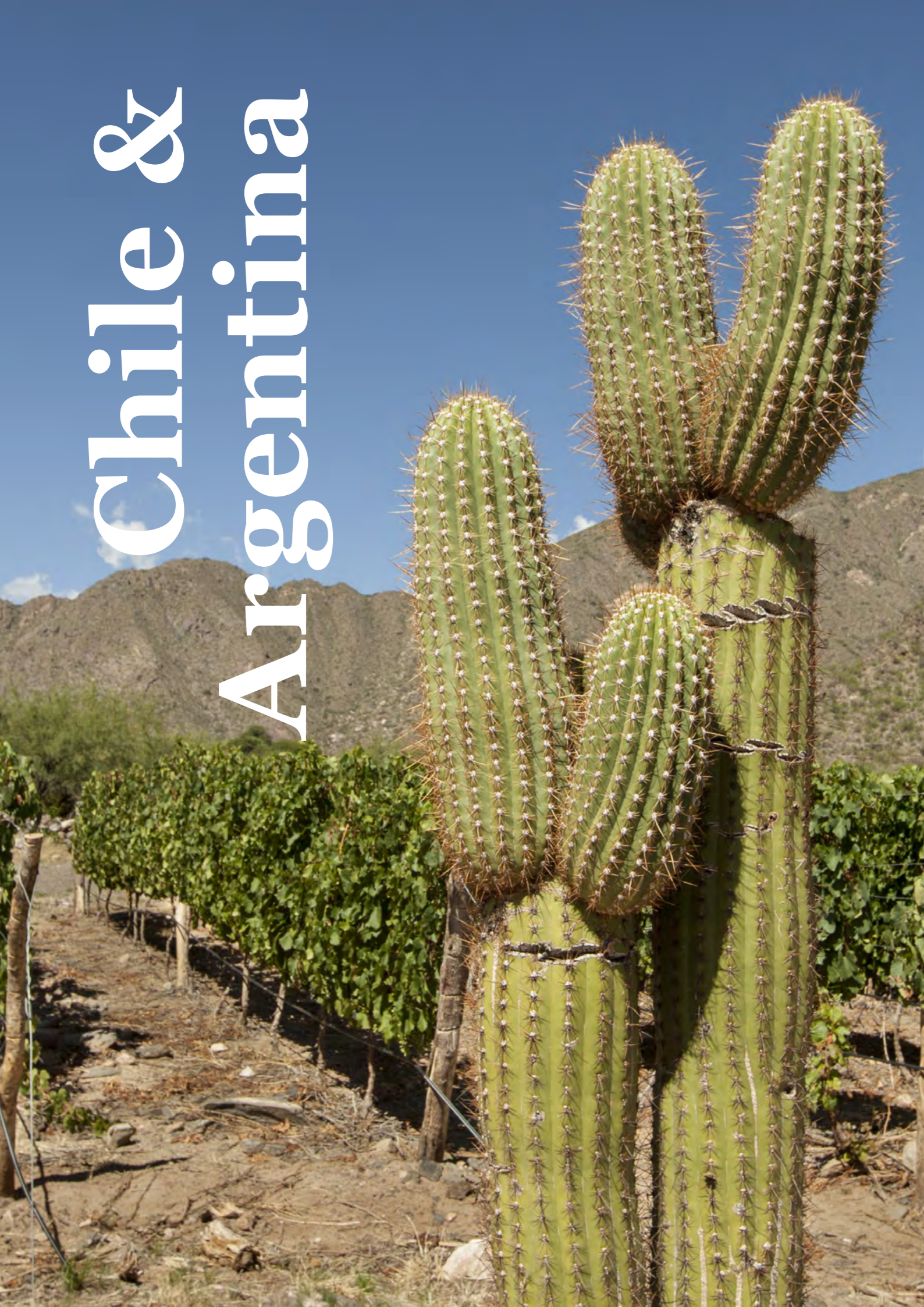
New Zealand

DOWN UP JAN NOV



New Zealand was already chasing the short 2020 harvest based on a tight 2019 supply. In November 2020, a major frost event impacted budding and flowering season, this was then followed by a prolonged drought in the three months prior to harvest. Further to this the whole industry has also been facing increased production costs, and ongoing labour shortages due to border closures. Wineries have to deal with lower volumes of grapes harvested, higher costs but also an "unprecBLA AR FWYDted demand" from export markets. Overall, total volume is reported to be down 19%. However, some producers in Marlborough are critically short of wine, with some reporting up to 40% less than the previous short vintages with no relevant inventory volume to support this. As a result, availability is looking to be very low. It is worth noting that the other regions of New Zealand do not make up for this shortfall, also Sauvignon Blanc was not the only variety that was affected. Pinot Noir was hit particularly hard, the inclement weather at flowering for yield reductions of as much as 35%, compared with the bountiful 2020 vintage.

Chile & Argentina



Chile

Argentina

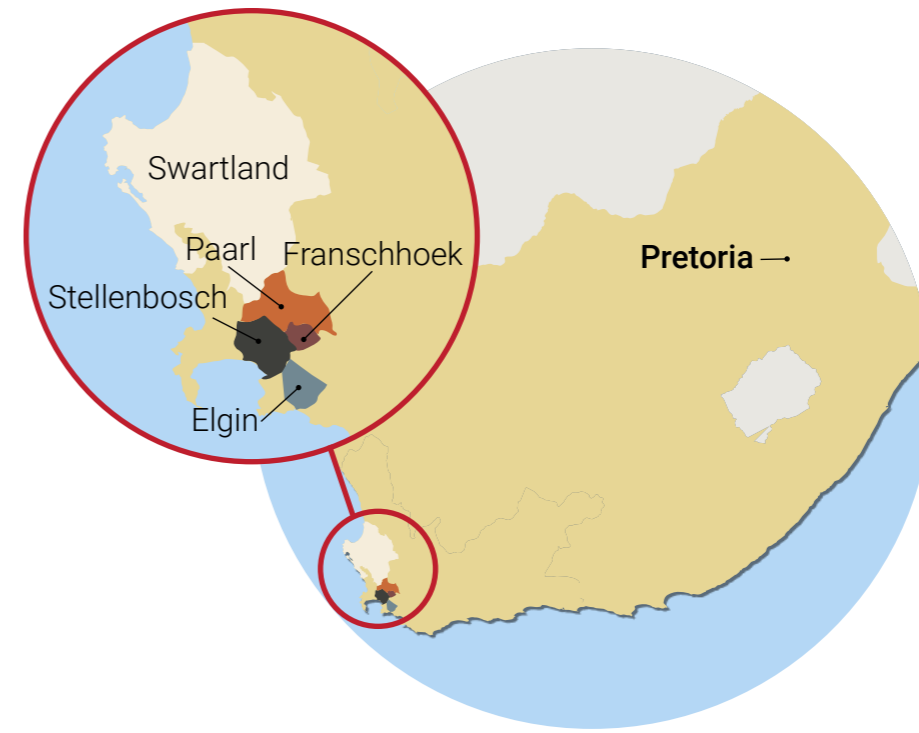
DOWN \$ UP ❄️ OCT

2021 is overall a much fresher year with slow maturation which has offered some stellar quality in lower-yielding, quality-focused sites and should lead to wines of higher acidity, lower alcohol, and good concentration. Much needed winter rain in the season helped with water supplies and gave a boost to the dry-farming regions. Regions such as the Limari are looking particularly fantastic – with optimal balance and fresh acidity from a cooler vintage. A three-day frost in October affected some parts of Casablanca and San Antonio, especially as the region is mainly planted with early-budding varieties, with Viognier being particularly affected. Casablanca, Leyda and other coastal areas were able to produce truly cool climate wines, with a very late harvest due to slow ripening but quality is looking to be very good. In Maipo and Colchagua valley equally experienced a late harvest, with harvest continuing into April, looking to be a very good year for Cabernet Sauvignon from these regions in particular.

DOWN \$ UP 🌧️ MARCH

Just as things were kicking off, on 5 October 2020, frost hit many vineyards in the eastern part of Mendoza, with the region anticipated a drop in 25% in yields. Following a warm beginning, by mid-January temperatures started to drop and in February rain began to fall, continuing into the first week of March. However, the uncertain start to the vintage seemed to have paid off. With early indications of 2021 being an extraordinary harvest. The cooler climate early in the harvest, followed by warmer conditions from March onwards meant that many in Mendoza will be able to produce wines with very good concentration, much lower alcohol potential than in other years and excellent acidity. In San Juan, the second largest wine-producing province, the 2021 harvest was one of the best in recent years.

South Africa



South Africa

 STABLE  UP

The harvest kicked off around two weeks later than normal due to unusually cool weather conditions throughout the season, which persisted throughout harvest time and resulted in some wine grape producers harvesting their last grapes in May. For Stellenbosch, Paarl and Franschhoek, 2021 was the coolest summer in five years, sufficient reserves and cooler weather contributed to yields equal to that of 2020. The lack of severe heat waves, which usually occur in this region, has largely contributed to even ripening and excellent, elegant wines are expected. Water resources were

also replenished in most regions following the recent drought, which contributed to good vine growth, bunch numbers and berry sizes. No catastrophic heatwaves which previous vintages have suffered. Although the cooler conditions bring about their own unique challenges for regions such as Elgin. The cool and wet weather continued into spring, which contributed to delayed bud break and initial growth and made the timing of disease control more challenging. However, it has enabled producers to truly make cool climate wines of exceptional quality.



Rest of Europe & Lebanon



Austria

STABLE JULY

Austria experienced excellent vine growing conditions, with a cool start to the year meaning later than usual budding and flowering. Kremstal avoided the hail that hit much of Austria's vineyards but there was heavy rain in July. After that however, the summer was warm and dry and allowed for good even ripening. Quality is very good and volumes are average.

Hungary

DOWN JUNE/JULY

Hungary experienced the coolest spring in 100 years, but that was followed by a hot dry summer allowing good ripening although the last week of August was very cold leading to grapes with high acidity. On the whole, volumes are quite low but quality is excellent for both dry and botrytised wines. 150km southwest on the Romanian border, where Nachbil are based, conditions were very similar.

Georgia

STABLE JUNE/JULY AUG

Georgia experienced a year of extremes with a cold winter and much snow (though mercifully not frosts) delaying budding and flowering, followed by a long hot dry summer that allowed everything to catch up. Volumes and quality are generally good (after a low yielding 2020) however some vineyards were affected by localised hailstorms in August.

Greece

UP JUNE/AUG

Greece experienced a very hot summer and even for those lucky enough to be spared from the wildfires, ripening has been very uneven so 2021 is considered a good year for enologists to demonstrate their skills! Looking a better year for reds than whites at the moment, volumes should be good however.

Lebanon

DOWN UP AUG APRIL

Working under the stressful conditions of inflation, fuel shortages and increase in prices was very difficult for everyone involved. Spring came earlier this year, which resulted in early bud break followed by spring frost that affected Sauvignon blanc, Viognier and Chardonnay. However, Obeidi and Merweh were not affected. Harvest around the second week of August with the warm weather being moderate. In terms of quality of the grapes, it is so far showing to be an impressive this year. With wines already showing good acidity and concentration in all the varieties, especially for Cinsault.

