

2021 Vintage Report



The Wine World at a Glance in 2021

COUNTRY	REGION	YIELD	QUALITY	COUNTRY	REGION	YIELD	QUALITY	COUNTRY	REGION	YIELD	QUALITY				
	France	Alsace	Down	Good		Spain	North Central	Up	Very good		New Zealand	Marlborough	Down	Very good	
		Burgundy & Beaujolais	Down	Good			Catalunya	Down	Very good			North Island	Down	Very good	
		Bordeaux	No change	Good			South	Up	Good			Central Otago	Up	Good	
		Loire	Down	Good				Portugal	Douro	Up	Very good		South Africa	Up	Good
		Provence	Down	Good											
		Rhône	Down	Good		England	South-East	Down	Good		Chile	Up	Mixed		
		South of France	Down	Good											Greece
	Italy	Veneto	Down	Good		Australia	South Australia & Victoria	Up	Very good		USA	California	No change		
		Piemonte	Down	Very good			New South Wales	Up	Good			Oregon	Down	Very good	
		Tuscany	Down	Good			Wales	Up	Good			Washington	Up	Good	
		Centre	Down	Good			Western Australia	Up	Good		Canada	Down	Good		
		South	Down	Good											

Vintage Snapshot: France

Harvest at Château Léoube in Provence, France



Vintage Snapshot: France

Loire

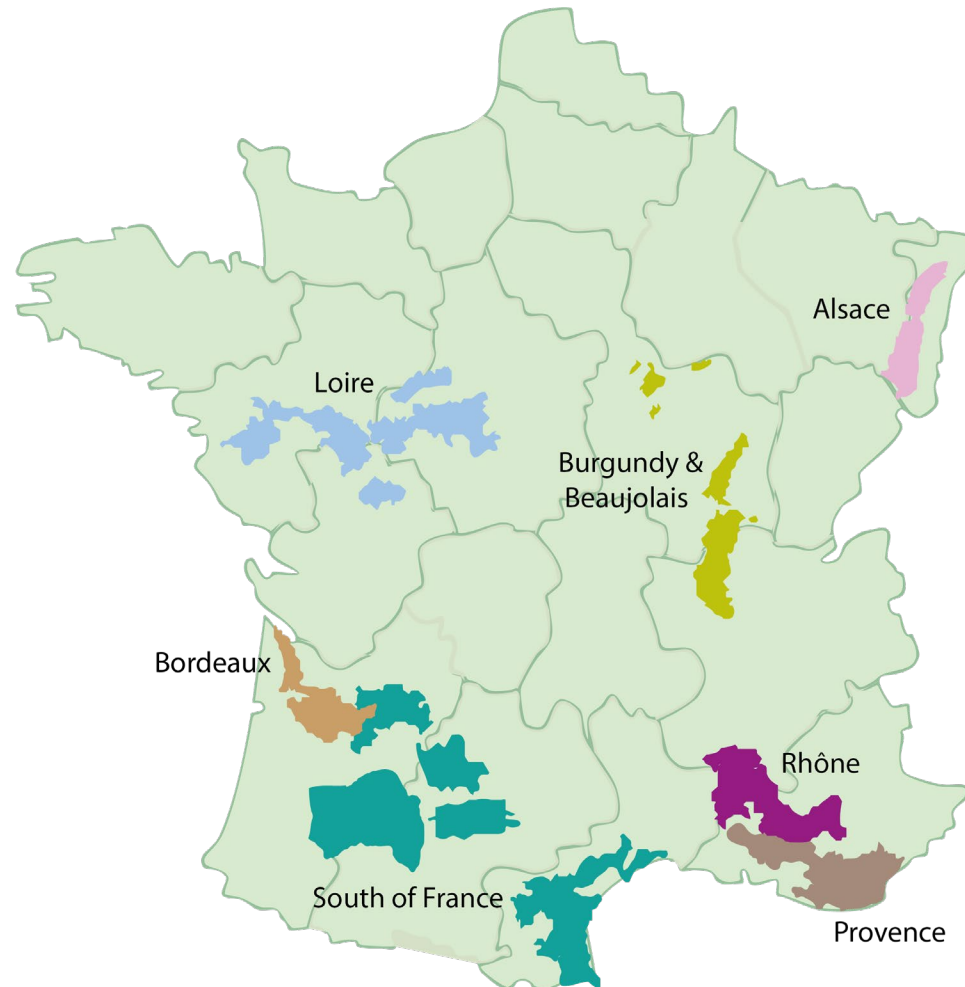
- Spring frosts and hail
- Yields down 40% on 2020, especially in Sancerre, Muscadet, Touraine, Pouilly-Fumé
- Good quality but low availability

Bordeaux

- Spring frosts and mildew
- Same yields as 2020
- Good quality and good availability

South & South West

- Severe spring frost in Gascony; some spring frost and drought in Languedoc-Roussillon
- Yields down 40% on 2020, especially for white grapes
- Good quality but extremely low availability



Alsace

- Powdery and downy mildew
- Yields down 20% on 2020
- Rigorous sorting to maintain quality

Burgundy

- Severe spring frosts
- Yields down 50% on 2020
- Good quality but low availability

Rhône

- Spring frosts and drought
- Yields down 20% on 2020
- Good quality but extremely low availability

Provence

- Spring frosts
- Yields down 10% on 2020
- Good quality

Vintage Snapshot: Italy

Summer at Fontanafredda in Piemonte, Italy

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Vintage Snapshot: Italy

Piedmont

- Good ripening period, no problems
- Yields down 5% on 2020
- One of the best quality regions for 2021, an exceptional vintage for Barbera

Tuscany

- Spring frosts and dry hot summer
- Yields down 25-30% on 2020; one of the worst hit regions
- Good quality but low availability

South

- Dry, hot summer
- Yields down 15-25% on 2020 on average (down 25% in Abruzzo, but up 5% in Campania)
- Good quality but extremely low availability



Veneto

- Spring frosts and hail in August
- Yields down 10% on 2020 on average (down 10-15% for Glera and down 5-7% around Verona)
- Good quality

Centre

- Spring frosts and dry, hot summer
- Yields down 15-25% on 2020
- Good quality but low availability

Vintage Snapshot: Spain

Sun breaking through the clouds at Bodegas Juan Gil in Jumilla, Spain



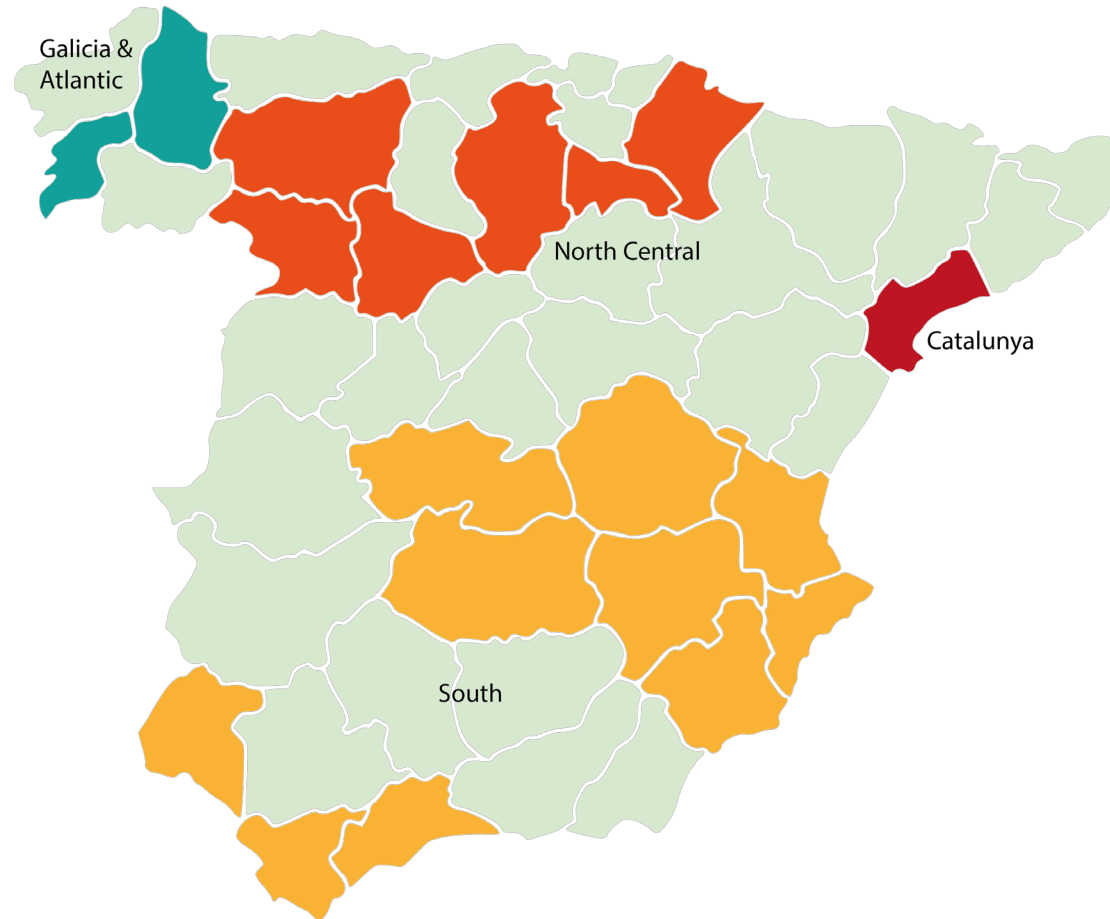
Vintage Snapshot: Spain

Galicia

- Good cycle with some rain at the beginning of harvest; nice change after several years of short harvests
- Yields up 23% on 2020
- Good quality: healthy grapes, well-balanced alcohol, acidity and tension. May not be particularly long-lived but will be very pleasant for 2-3 years

South

- Wet autumn and winter gave way to hot and dry ripening season; one of the earliest vintages on record
- Yields up 7% on 2020
- Good quality with clean fruit, well-balanced sugar and acidity



North Central

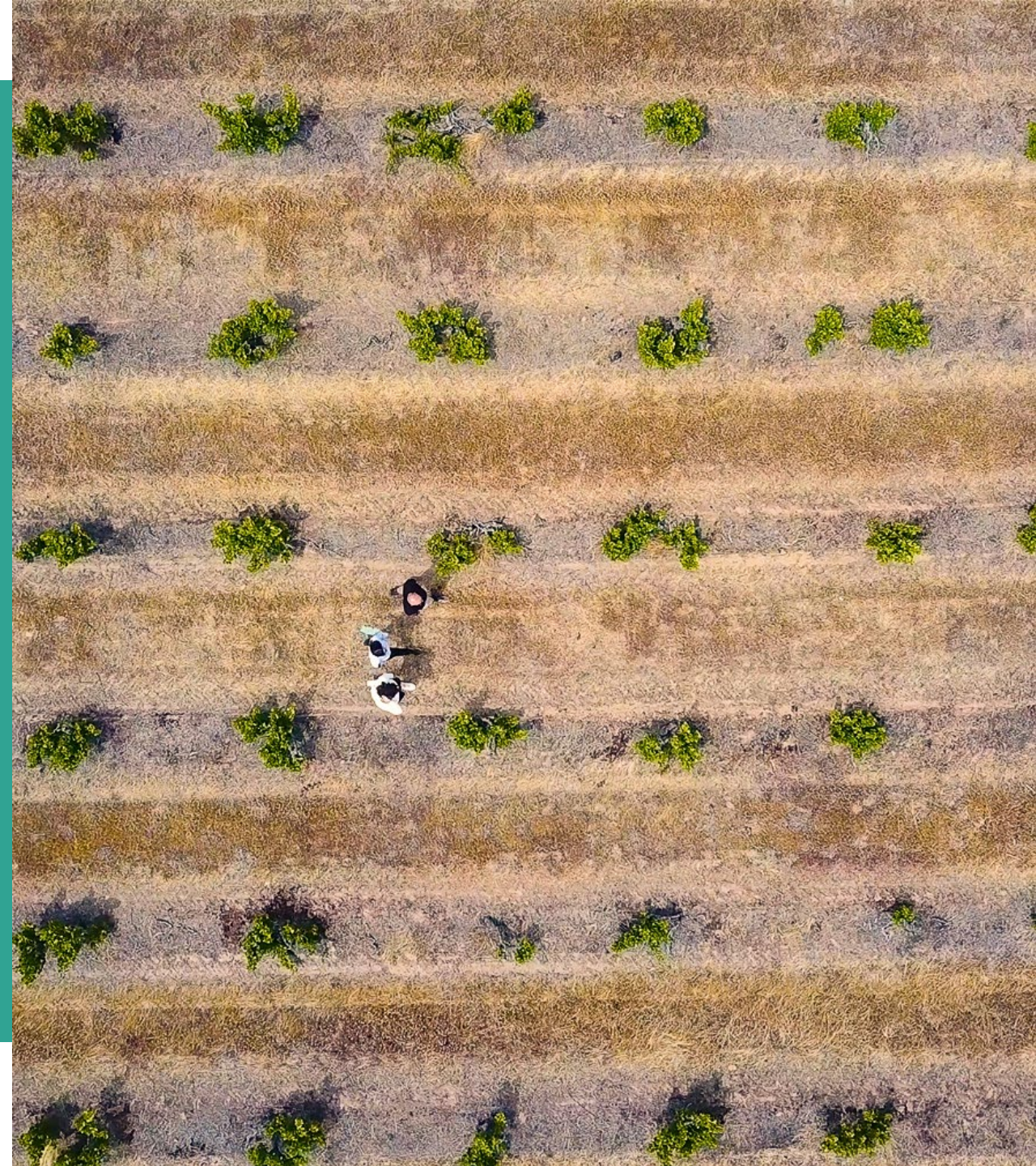
- Scorching summer in Rueda; hail in May in Ribera del Duero forcing a second pruning
- Yields up 3% on 2020 on average, but down 50% on 2020 in Ribera del Duero
- Very good quality, including flavourful Verdejo from Rueda, plenty of aging potential in Ribera del Duero and probably the best vintage in 15 years in Rioja with beautiful, balanced reds

Catalunya

- Drought, but January snow boosted water reserves
- Yields down 20% on 2020
- Very good quality following two tricky years; green harvesting to ensure fruit ripened. Vineyards at altitude benefitted in particular

Vintage Snapshot: Australia & New Zealand

Walking through the vines at Rojomoma in Barossa Valley, Australia.



Vintage Snapshot: Australia & New Zealand

Western Australia, Australia

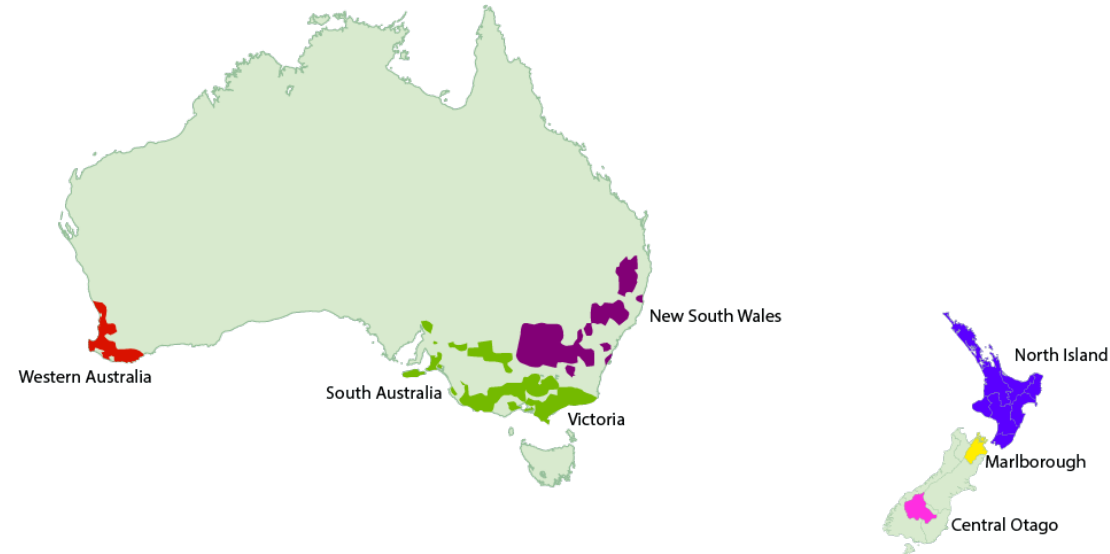
- Extreme weather: wet spring, hot dry summer, wet harvest
- Yields up 21% on 2020, but below average
- Excellent quality for those who put in the extra work; complicated by labour shortages

South Australia & Victoria, Australia

- Near-perfect conditions: few heatwaves and perfectly timed rain
- Yields up 44% on 2020 in South Australia; yields up 25% on 2020 in Victoria
- Optimal ripening for good natural acidity and balanced ripeness

New South Wales, Australia

- Classic cool conditions, well-timed rain
- Yields up 17% on 2020
- Classic vintage for Semillon, and promising quality for reds



North Island, New Zealand

- Late spring frosts, hot dry ripening period
- Yields down 19% on 2020; lowest since 2015
- Superb quality, especially in Hawkes Bay

Marlborough, New Zealand

- Late spring frosts
- Yields down 21% on 2020
- Sauvignon Blanc will be aromatic, complex and layered; Pinot Noirs will be complex, plush fruit, good structure and bright acidity

Central Otago, New Zealand

- Late spring frosts
- Yields up 21% on 2020
- Good quality, especially for Pinot Gris

Vintage Snapshot: South America

Vineyards in the shadow of the Andes at De Martino in Maipo Valley, Chile.



Vintage Snapshot: South America

Chile

- Cooler than average, rain in January
- Yields up 23% on 2020
- Mixed quality; very good quality reds, but whites had to be harvested early to prevent botrytis setting in after the rains

Argentina

- Cool with spring frost and hail; low rainfall during growing season but double typical rainfall during ripening
- Yields down 6% on 2020
- Good quality, concentrated with high acidity and good pH



Brazil

- Cool conditions for a fresh vintage
- Yields down 15% on 2020
- Very good quality, albeit not as excellent as the historic 2020 vintage; still good acidity and low pH for a fresh and fruity style of wines

Vintage Snapshot: USA

Picked grapes at Louis M. Martini in California, USA



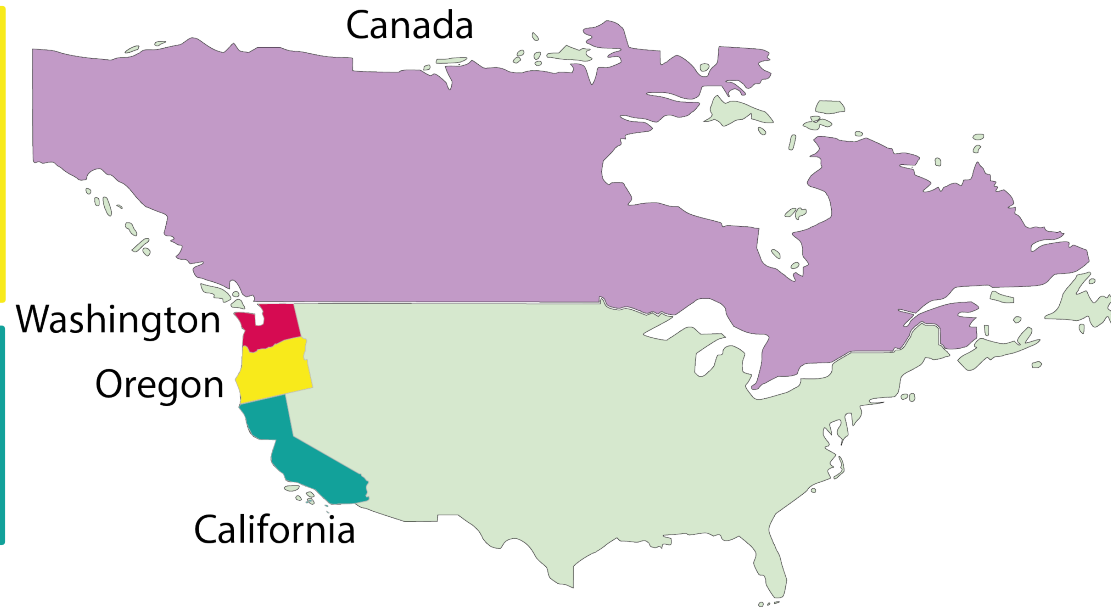
Vintage Snapshot: North America

Oregon

- Heatwave and drought; no wildfires
- Yields down by as much as 30% on 2020
- Very good quality; small berries for concentrated flavour and elegant balance

California

- Drought; no wildfires
- Yields same as 2020, which was a 9-year low
- Good quality, concentrated flavour



Canada

- Mild autumn and winter
- Yields down 25-30% on average for icewine; lowest yields for 20 years
- Good quality, but producers encouraged to make dry wines rather than icewine

Washington

- Heatwave, rain and wind affecting bud development
- Yields up on 2020 as land becomes productive
- Good quality, particularly for reds

Vintage Snapshot: Rest of the World

Keeping an eye on the vines at Hattingley Valley in Hampshire, England

Enotria&Coe



Vintage Snapshot: Rest of World

Douro, Portugal

- Moderate temperatures with hail and mildew later in the season
- Yields up 20% on 2020, but 2020 volumes were low
- Very promising quality; slow ripening encouraged good acidity. The Douro suffers from labour issues exacerbated by the pandemic.

South Africa

- Moderate weather with water reserves replenished after recent years of drought
- Yields up 9% on 2020
- Good quality; good phenolic ripeness over a long season



South East, England

- Severe spring frosts, very wet growing season
- Yields down 5% on 2020
- Similar quality to 2013 and 2015: wines with great aging potential

Greece

- Spring frosts, extreme summer heat and wildfires
- Yields down 26% on 2020
- Very promising quality of whites but remains to be seen for the reds