

ALLIANCE WINE



Vintage Report 2020
Northern Hemisphere

The Northern Hemisphere 2020

2020 has been a very challenging year for everyone, with fear and uncertainty dominating these unprecedented times. With the pandemic preventing travel many wineries have been left short-staffed and forced to impose new safety procedures amidst the wonderful chaos that is a winery during vintage.

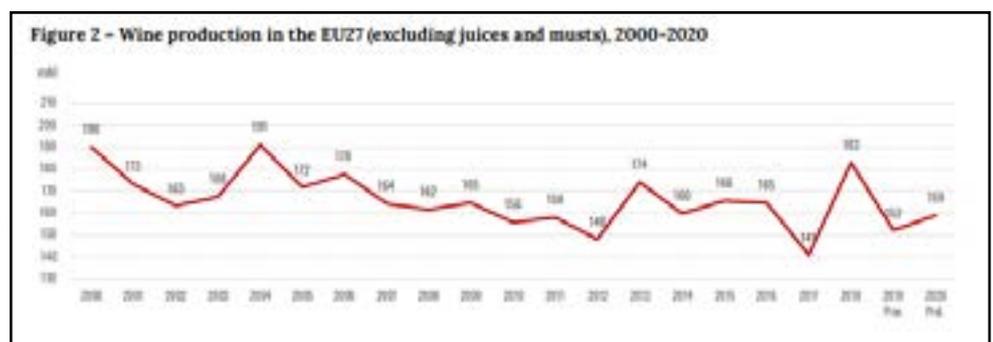
As with previous years, the growing concerns related to climate change is echoed amongst growers from all over the northern hemisphere. We have witnessed mild winters, record breaking temperatures, erratic weather events, along with the earliest picking dates on record. Climate change takes shape in a number of different and devastating ways: scorching heat and deadly wildfires in California's Napa and Sonoma; drought and heat waves in France; thunderstorms and tornadoes in Italy. While opportunities arise for borderline regions such as East Sussex in England, climate change forces our winemakers from all over the world to behave more reactively in the vineyard to ensure stable and balanced juice in the winery.

And if that weren't enough for our growers to contend with - could US tariffs as well as the delays caused by additional red-tape imposed by Brexit make 2020 the most difficult vintage to date? Touch wood, only time will tell. What we do

know is there has been no choice but to rise to the challenges of 2020 and pull together. Even during the darkest of days we have witnessed humility and kindness from our winemakers, and an impressive demonstration of unwavering commitment to their work and their workforce.

According to the International Organisation of Vine and Wine (OIV), the production volume this year from countries in the European Union is estimated at 159.0 mhl (excluding juices and musts), about 5% more than in 2019. This volume shows an annual increase of 7 mhl compared with 2019.

Pau Roca, director general of OIV has stated that in light of the current context where "geopolitical tensions, climate change and Covid-19 pandemic are generating a high degree of volatility and uncertainty in the global wine market, this initial estimate is anything but bad news for the industry." He said, "Good weather conditions favoured a potentially large 2020 harvest; albeit, that has been limited by different measures at both, the government and producers' association levels aiming at mitigating the negative impacts of Covid-19." Production in the three largest producing EU countries, Italy, France and Spain, was mixed with a 1% decline in Italy to 47.2mhl, a slight 4% increase in France to 43.9mhl and a more than 11% rise in Spain to 37.5mhl.



France

French wine production has increased slightly from 43.4mhl to 43.9mhl. Mild winter temperatures across the country led to early budbreak, followed by a hot summer that has caused the earliest picking dates in 650 years for some regions. For others, the heat has caused widespread damage to vines and grapes.

Bordeaux

Bordeaux experienced the warmest summer since 1959. A similar story to 2019 where farmers battled with several heat waves, reporting temperatures 1.5°C above the average of the past 30 years. The heat results in early flowering and has led to another early harvest, kicking off two weeks before the norm and yielding grapes with high potential alcohol and the lowest acidity since the 2003 vintage. Fortunately, the rain fell at the right times during the growing season, bringing some relief to growers and their vines. The 2020 vintage is characterised by healthy maturity in the grapes, and we can expect a more opulent vintage compared with the last few vintages.

Loire Valley

After a very challenging 2019 vintage for our producers in the Loire, they are reportedly very happy with what has been achieved in 2020. The dreaded spring frosts which have provoked fear amongst growers for the past 5 years did not materialise. The period around flowering

was a little more stressful due to the threat of mildew & oidium, but in general the *sortie de grappes* were excellent and everyone was very enthusiastic.

Again, this year, everyone experienced several intense episodes of heat waves, which subjected the vines to hydric stress and in many cases resulted in a 10% - 25% loss in potential volume. Fruit ripeness was never going to be an issue, September was very warm, at around 30°C+ almost every day for the first three weeks of the month. Sugar concentration took place very quickly with potential alcohol rising approximately 1.5 to 2 degrees per week during the first 3 weeks of September, resulting in quite high degrees in some areas. The root systems succeeded in finding water and the rain, which arrived towards the end of harvest in some areas, gave a very welcome boost to overall yields, particularly for the reds. The juices we have tasted to date demonstrate superb concentration and are perfectly balanced with delicious and elegant fruit density supported with classic Loire freshness.



Burgundy & Beaujolais

With low recorded rainfall and moderate temperatures throughout the growing season, we're delighted to report 2020 passed without any major issues for Burgundy producers, especially after 2019's erratic weather having caused significant reduction of yields last year. At the end of July unfortunately two very warm days (more than 40°C) made significant damages in Chablis, roasting the grapes. Bernard Defaix reported from Rully, "the Chardonnay resisted rather well while the Pinot suffered a lot from the drought with problems of withered berries. Regarding the quantity, we went from a good (even very good) harvest to an average one."

Many areas experienced an incredibly early harvest starting as early as mid-August. Chablis producers began picking in the first week of September. Louis Moreau, president of the Chablis Commission, says that the biggest challenge of the 2020 harvest is one similar to other wine growers around the world, "global warming." The rain during the last week of August helped to rebalance the situation and extended the maturity period.

Qualitatively, the vintage 2020 has a style very closed to 2019, an excellent balance of acidity and alcohol, a very good texture and certainly a great potential for ageing. On the reds, the outstanding maturity gives a concentration a bit higher than usual while remaining on a good balance.

Rhone Valley

Winter in the Rhone was dry and mild, the second warmest winter on record after 2015. Bud break started early, at the beginning of March. This very early bud break was detrimental in some areas, as a late frost impacted the earlier maturing vineyards. During summer, the high temperature during the day has been balanced by some cooler nights, while some localized rainfall brought enough water to the vines, helping the berries to reach the perfect level of maturity. The white grapes were picked in early August in the south part of the Rhone Valley. Further north, the harvests began around 25th August. The red grapes were picked in September, both in the north and south of the region. 2020 looks like a very promising year, the first juices are demonstrating an excellent balance with pleasant acidity and fairly high alcoholic content.



Guillaume Gonnet with his vines in summer, Chateauneuf du Pape

Languedoc Roussillon

A mild winter resulted in early budburst for Languedoc growers, at the beginning of March. High rainfall was experienced during springtime, followed by drought at the beginning of June. This led to an early vintage, the first grapes were picked in the first weeks of August. The good weather conditions in August and September allowed the harvest to stretch over a long period, picking the grapes at the perfect moment, when ripeness was optimal. 2020 was one of the earliest vintages of the decade, along with 2017.

2020 vintage in the Roussillon area was once again characterised by severe drought, leading to a sharp drop in yields. The Roussillon wine region has hardly any irrigated vineyards. However, old vines, more resistant to drought thanks to their deep roots, predominate in the region. Despite the affected yields, the grapes came in in excellent condition, healthy and concentrated. The wines are generous and full bodied, with a very intense profile.



Provence

As for most of the other wine regions in France, 2020 was an early vintage for Provence. Winter was particularly mild, and bud break started early during a rainy spring. The spring was impacted by an unusual episode of frost at the end of March. Exposed vineyards were affected worse than those that were sheltered. The summer was warm and sunny and the high temperatures did not impact the ripening process. In the most advanced areas, the first grapes were picked from 15th August, one week earlier than the 2019 vintage. The late maturing grapes, such as Marsanne, Roussanne and Grenache, were picked by mid-September. The harvest took place in glorious sunshine, in perfect sanitary conditions. 2020 is a very promising vintage for Provence, making up for the small harvest experienced in 2019, with a lovely balance between sugar and acidity. The colours are delicate and the aromatic profile of the rosés is particularly expressive.

Spain

2020 was a much wetter year in Spain, especially for coastal regions. Generous spring rains coincided with warmer temperatures which provided the ideal conditions for mildew. This has impacted more on yield than quality. Drier weather and higher temperatures in the summer months saw mildew retreat, permitting growers a healthy period for picking, however picking dates were significantly earlier than previous years, in some regions in the beginning of August.

Spanish authorities estimate that the total figure for the latest crop will be around 37.5mhl, similar to that of 2019, and a significantly lower figure than the 2018 vintage which reached around 50 million hectolitres. Spain's average harvest is currently 43 million hectolitres.

Galicia

DO Rias Baixas makes up 55% of the total production in Galicia. Mild temperatures over the winter months led to early bud burst. Due to heavy down pours during the budding period black rot and mildew set in, reducing crops by up to 50%. Growers then faced new challenges as summer approached, with high temperatures and dry conditions, which is highly unusual for this Atlantic region. Heavy rain in August brought fears of botrytis, however September was dry to the relief of our farmers, who



enjoyed the harvest without interruption. In terms of yield, the total Rías Baixas harvest is similar to the very small 2019 vintage.

Due to Ribeira Sacra's vineyards being typically located on steep slopes and further inland, growers in this region were saved from the ravages of mildew that other regions experienced, at least in early spring.

Catalunya

Parts of Catalunya welcomed the rain, especially for those who had experienced drought for many years. The water reserves brought relief and lower temperatures made farming easier to manage as well as promoting a fresher vintage with good

levels of acidity. In Valencia higher rainfall was welcome after the extremely dry conditions of recent years. There was favourable weather over the harvest period resulting in good yields, around 5% higher than 2019, and "exceptional quality".

However, when the rains continued for growers in flatter regions, the intensity took its toll. Montsant had 622mm of rain in 2020 compared to 194mm in 2019, bringing mildew throughout the growing period. Growers

in this region, including our friends at Celler de Capçanes, were required to be more selective with their harvest, resulting in the smallest harvest to date. Despite low yields, fruit quality was good with balanced alcohol and acidity and generous fruit character.

Rioja

Compared with the much lauded 2019 vintage, Rioja experienced an extremely difficult year in 2020, with adverse weather across the entire region and little respite until the second half of the vintage when cooler temperatures arrived. Many growers, including Abel Mendoza in San Vicente, said it is probably one of the most difficult years in history. Spring brought mild temperatures, along with strong and frequent storms, three of which involved hail. This gave perfect conditions for mildew, reducing crops significantly. By September temperatures had warmed up, which accelerated growth to an undesirable extent. By the second heat wave the grapes had begun to raisin, and growers were forced to pick early in mid-September to ensure a healthy crop. Rain during the picking season is not normally welcomed, however

it helped to slow down the rate of phenolic ripening and meant the resulting harvest maintained good levels of acidity.

Navarra

Across the River Ebro, Navarra was spared the severe fungal diseases that struck other regions, and meant the harvest was more generous compared with the previous year. Growers experienced low rainfall between April – October and a dry, hot growing period.



Rosalia Molina, winemaker from AltoLandon in Manchuela

Italy

High rainfall in November and December of 2019 allowed Italy's water reserves to be restored. Initial predictions from OIV indicate a reduced overall production of 47.2mhl, down only 1% compared to 2019. We're happy to report that despite a chaotic year for most of us, 2020 is looking like a successful vintage for many Italian producers.

Veneto

The growing season began slightly early for our Venetian growers, and with no reported problems during flowering and fruit set. Mild temperatures and precipitation from March through July were beneficial. Temperatures rose in July and early August, followed by summer storms in the flatlands of Valpolicella that were intense and created some sporadic problems due to heavy rain and some hail, but thankfully didn't create any lasting damage. The quality and health of the grapes are good, with normal levels in sugar, in line with previous years

Piedmont

2020 is a vintage to watch, as Barbera and Nebbiolo producers report a calm growing season, with nice weather throughout August and September. The harvest began in October and the health of the grapes is reported to be perfect, with good sugar levels and phenolic ripeness. The key contributing factor was the temperature shift between day and night, helping to develop great aromas and retain freshness.

Tuscany

The weather in Chianti and Montalcino in San Polino's words "behaved perfectly and properly all summer long with a hot July and August interspersed with exactly the right amount of rainfall at exactly the right time." Rain just before the harvest brought the relief vineyards needed from hot winds and the soils greedily absorbed any excess water in time for picking. The 2020 vintage for Brunello di Montalcino has less quantity than usual but its quality, San Polino reports, "is out of this world. May be one of those vintages to remember."

Sicily

The 2020 vintage was very typical for Sicilian growers, and with no major issues. The weather was very dry throughout the year, with some drought, but not too hot, and without extensive heat waves. Mild winds gave the island a healthy environment for grapes to grow and for pickers at harvest time. At the end of July temperatures dropped and there was a lot of rain, which re-balanced reserves and slowed ripening. Thanks to a temperature range of almost 20 degrees between day and night, we can expect good acidity, balanced with phenolic ripeness in Sicilian wines from 2020.



Cantine Rallo's Grillo vines, Marsala, Sicily

Portugal

Portugal recorded a total output of 6.5mhl in 2020, which is in line with its 2019 production and with its last five-year average (OIV). Many regions are still contending with increasing temperatures during the summer months, and growers across Portugal's wine regions have experienced yet another early harvest.

Douro Valley

The average July temperature in the Douro was the highest in 40 years, forcing some estates, lower in the valley to start picking in early August. The slightest of gradient supplied necessary relief from the heat and lengthened the growing period for producers such as Quinta da Costa do Pinhao. Yet for many growers the heat dehydrated grapes, cutting yields by up to 40% less than what is normally forecast.

Dão

In Dão, spring rainfall increased the risk of Mildew, causing a significant reduction in yields across the region (down 25% compared with 2019). A dry, hot summer (similar to that in Douro) gave healthy, concentrated grapes and producers are especially happy with red varieties such as Touriga Nacional and Aragonez.

Quintas do Homem vineyard in spring



Vinho Verde

Vinho Verde's harvest began earlier than usual due to mild temperatures in winter and spring triggering an early bud burst, two weeks ahead of schedule. Temperatures soared above 40°C during the summer months, which led to the harvest starting a week earlier than usual. Despite the hot year Quintas do Homem has reported good acidity levels, balanced with concentration of flavour

England

England has long been associated with inconsistent, unpredictable weather patterns that force our growers to be on the edge of their seats during much of the year. Yet 2018 and 2019 delivered great vintages for our English producers, witnessing no late frosts and warm, moderate temperatures that required less battle tactics, and allowed for more enjoyable farming.

However, in April and May of 2020 the frost reared his head once again to contend with young buds and impose what may be long-term effects on the most exposed and marginal of England's vineyards. Some growers lost up to 80% of their crop. This will no doubt affect the availability and cost of 2020 vintage wines from certain regions.

Despite this, the growing consensus on English wine, especially of that coming out of the south east, is that we are witnessing riper, more concentrated, less astringent grapes that allow for more flexibility on styles and grape varieties that are planted. We can expect table wines to become more available, made from not only Bacchus, but high quality Pinot Noir and Chardonnay



Young vine during the spring frost, Hidden Spring Vineyard, East Sussex

California

The USA accounts for about 12% of northern hemisphere total production. First harvest forecasts in the US indicate volumes in line with 2019, but uncertainty caused by wildfires might lead to further revisions, since complications from fire and smoke taint may prevent part of the grapes from being vinified (OIV).

2020 was set to be a fine vintage on the west coast until heat waves followed by wildfires arrived at the end of August in Napa and Sonoma counties. In Napa, the fires were in the Vaca Mountains on the remote east side of the valley. They killed three people, burned 165,000 acres, and damaged more than 1,000 homes and structures, including two wineries and several vineyards. Farmers were still picking white grapes at this point, while smoke filled the air. Picker prevailed into the night in an attempt to avoid soaring daytime temperatures. We're unsure of the damage smoke will have caused, however due to Napa's varied topography some areas will have experience different levels of exposure.



Night harvest, Paul Hobbs Estate, Sonoma County

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