



**ALLIANCE
WINE**

**Vintage Report 2021
Northern Hemisphere**

VINTAGE REPORT 2021

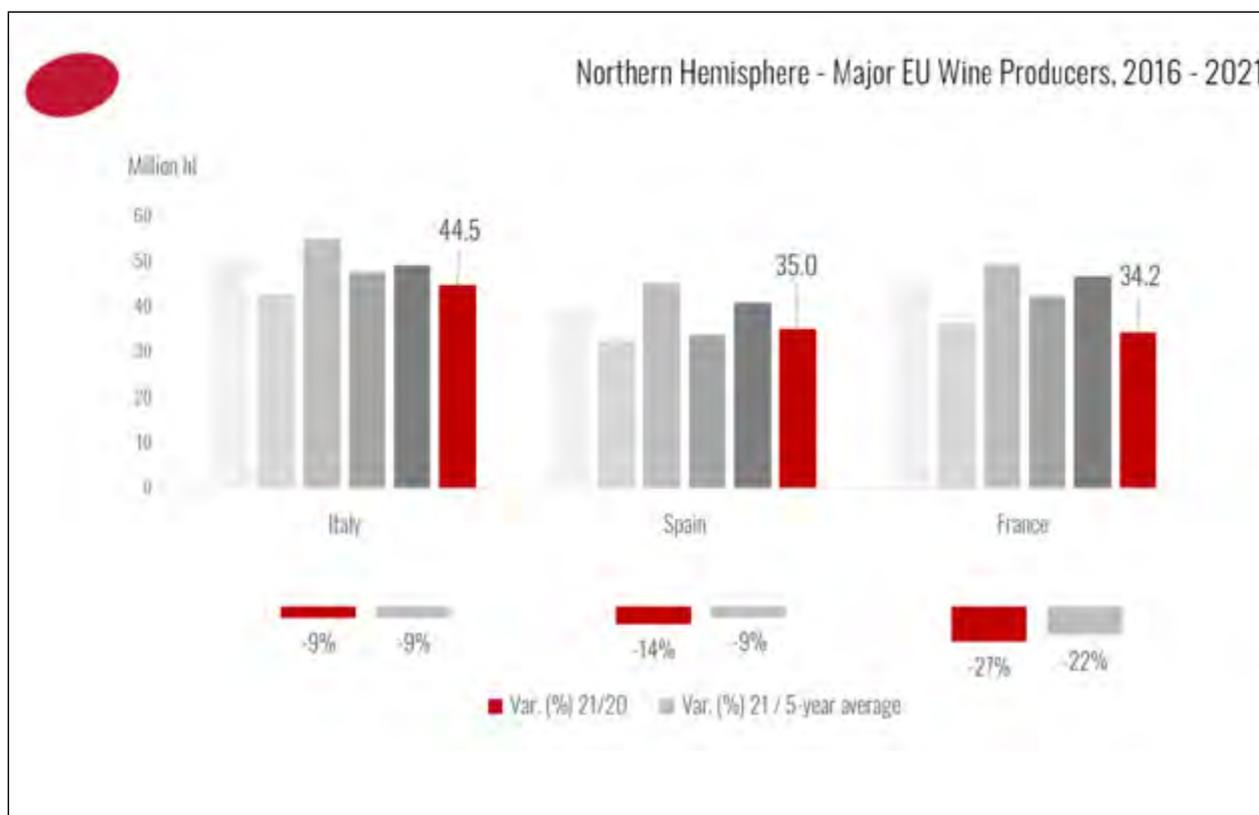
NORTHERN HEMISPHERE

Complex, strange, challenging, extraordinary, difficult ... call it what you want but there's little doubt that 2021 has kept viticulturists and winemakers on their toes. All regions have experienced shortfalls in volume, however the loss suffered by France was significant enough to see it lose its place as the world's second largest wine producer to Spain, with southern French crops down 40% against average, and as much as 50-70% down on white varietals.

Elsewhere in Europe experienced lower volumes, but nothing as dramatic; Italian volumes were down by 9% from 2020 figures, yet some late rain helped maturation in the Veneto, Puglia and elsewhere. Spain saw decreases, with La Mancha up to 50% down; as French bulk price increased, Spain followed suit,

leaving many suppliers facing unsustainably high prices, further compounded by increases in costs of dry goods and energy.

In 2022 the shelf price of wine will feel upward pressure, driven by increasing wine prices, global increases in freight costs, plus increased dry-good and other input costs. As we emerge from the impact of the pandemic, inflationary pressures across the supply chain will continue, as shortage of shipping containers, vessels and port efficiency remain major considerations on sourcing and supply.



SPAIN

Notable is the considerable reduction in volumes (up to 50%) coming out of La Mancha, at around 20-21 million hectoliters. High temperatures and storms throughout the growing season were followed by hailstorms in September. Pricing will increase from the unsustainably low prices offered for the 2020 vintage, driven by lower volumes, winemaking costs (which have risen by 20% since last year due to increases in dry-goods and energy costs). Demand for international varietal organic wines is also high, and without French availability, Spanish organic pricing has been pushed up considerably. Quality across the board is however good. Total 39 million hectoliters (15% down on 2020 and 9% down on the 5 year average).

RIOJA

Bodegas Manzanos, Rioja Oriental - This was a complex vintage; late frosts in April were followed by a battle against mildew and oidium in May. Isolated storms in June, finishing with extreme heatwaves in August. The harvest began with rain which forced the picking team to stop several times. Work in the vineyard has been essential in achieving a healthy harvest and cover crops were key to achieving the medium-high concentration in the grapes. Winemaker, Borja Ripa defines the vintage as one with moderate alcohol, good phenolic maturation and quality.

Bodegas Amaren, Samaniego, Rioja Alavesa 85% of their vineyards are located in the Alavesa village of Samaniego, at 550m+ above sea-level and close to the Sierra Cantabria

mountain range. 2021 was a relatively uneventful vintage, notwithstanding the hail storms of June that thankfully did not cause much damage but did effect the overall setting of the fruit and in turn a lower than average yield. The summer was very dry and cool, with cooling breezes from the north, which kept temperatures lower than usual in July and August. September was hot and humid, which helped keep the grapes healthy and complete maturation. Harvest started on 25 September with Tempranillo. Garnacha, Viura, finishing on 19 October with Graciano and indigenous, old bush vines Garró, Cadrete, and the 'Mother of Tempranillo,' the Benedicto variety.



Perfect grapes from the Manzanos harvest

Quality is good and characterised by a cool climate style with clear fruit definition which will make elegant wines with great ageing potential.

Bodegas Luis Cañas - Villabuena de Álava,

Rioja Alavesa – Grapes are sourced from small plots of old vines around the village of Villabuena de Álava and within 5km of the winery. 2021 has been a heterogeneous vintage, with very different phases. The year started with storm Filomena bringing snow. This episode gave way to a warmer period; budding was slightly later with some frosts from 12-15 April, mainly affecting the Leza vineyards, leaving smaller clusters than usual. Spring was mainly dry, however with some torrential downpours of up to 160 litres, accompanied by hail. Late spring and summer were dry and cool; the rains finally arrived in September and helped the grapes to complete their maturation. Due to these rains, the harvest was earlier and very selective. The harvest began on 20 September with white varieties, followed by

Tempranillo and Garnacha, on 28 September. A consequence of the drought and high temperatures in September made maturation very fast, reaching optimum alcoholic degrees and high acidities, which meant that the harvest was finished by 21 October.

Quality is good; the lower than average yields and good ripeness will make approachable and classic style Rioja Alavesa Crianza and Reserva styles.

RIBERA DEL DUERO

Bodegas Emilio Moro, Ribera del Duero -

2021 is predicted to be a vintage that gives great, powerful and long-lived wines from this region. Winter temperatures were slightly warmer than usual and between February and June average temperatures were up to 3°C higher than usual. However, early July temperatures cooled a little, thus lengthening the growing period. Maturation proceeded as expected, favoured by the almost total absence of rainfall from early September to mid-October, as well as the broad diurnal range, and the high sunshine hours. Harvest concluded on October 31 and results are excellent.



Harvesting Tempranillo at Emilio Moro, Ribera del Duero



The Harvest Team at Capçanes, Monstant

MONTSANT & PRIORAT

Capçanes, Montsant – ‘I started at Capçanes 25 years ago and not one of those vintages look the same. However, 2021 has been a bit of a challenge for our team, both in winemaking but especially on the vineyards. After two years of extreme heatwaves in Priorat and mildew, 2021 was expected to be miraculous. The year started with a big drop of winter snow (60cm!), beneficial for the vineyard, followed by light rains in spring and a warm summer without extreme heat days. All these factors combined suggested the perfect season we were craving for, with slightly higher yields than previous years and excellent quality of the grapes and vineyards.

Thanks to the reliable weather, the grapes ripened slowly and reached ripeness two

weeks before the planned start of harvest ... it all looked perfect, but due to several downpours at the end of August / early September, the harvest had to be postponed several times. Berries swelled and whilst sugar levels held constant, the following two weeks saw many grapes effected with rot and as a result 30% of the grapes were lost. We’d predicted a significant overproduction, so in the end, the losses were not such a big blow for the winery. 2021 production remained less than the big 2018 harvest but slightly above our last two small vintages of 2019/2020.

We cannot thank our farmers enough ... the manual grape selection after the late summer rainfalls, carried out on the fields was crucial for the perfect ripening and strict quality of the wine. As an extra incentive for our growers, we will be paying our members for the fruit they de-selected as well as what was

finally harvested. It only seems fair ... imagine, there are two weeks to go for harvest, and suddenly 1/4 of your income disappears. As a cooperative it is our obligation to support our farmers, even more with Covid still sitting on our back.

The strict manual grape selection in the field is going to be the difference between one producer and the other. In 2021 the wines have been made in the vineyards, more than ever. The 2021 young wines are already accessible and, at this point of the year, unusually clear, defined, and pure. The colour is deep, the tannins on the reds are serious and fine grained' - **Jürgen Wagner**

PENEDÈS & CAVA

2021 was a strange year in the Penedès and DO Cava, more reminiscent of 2018. Drought marked the year, with 50% less rainfall than usual in June, however summer was mild and rain followed in September, meaning harvest was in two phases ... the grapes picked before the rains, which had a relatively short growth cycle and those after the rains, which had longer on the vine.

Pinot Noir and Chardonnay ripened quickly because of the lack of rain, whilst the rain slowed down the maturation of Xarel-lo, Parellada and Macabeo. In general, the acidity is good giving fresh wines marked by some vegetal notes and powerful aromas. Grenache showed the best results, with lower alcohol than usual (almost 1 degree!).

It is important to point out, that 2021 is the first vintage where wineries are allowed to differentiate their Cava's according to areas - Comtats de Barcelona, Valle del Ebro and Viñedos de Almendralejo; and also according

Harvest at Sumarroca



to the 7 sub-areas - Valls d'Anoia-Foix, Conca del Gaià, Serra de Mar, Serra de Prades, Pla de Ponent, Alto Ebro & Valle del Cierzo

EMPORDÀ

'For **Perelada** it has been a vintage with low grape production but with very good quality for whites, rosés and reds. Temperatures throughout the winter were mild with very little rainfall. Budding and flowering were about 5 days earlier with most varieties.

The driest spring and summer in the last 30 years followed, with a rainfall of 320mm against an annual average of 600 mm. On the early morning of 8 April frost struck, with temperatures of -2°C, affecting some vineyards, especially Finca la Garriga but amazingly without affecting the final volume too much (around 5% down). The varieties set well, except for Garnacha where there was a significant drop in production (around 20-35% less).

The cold, dry Tramuntana wind, which usually blows off the Pyrenees, did not blow strongly during spring or summer and therefore did not spoil the buds and new shoots as usual. Grape production was low (172,260kg less than 2020 harvest), due to the small berries. Summer was hot, with high temperatures, in what was a diverse vintage in terms of phenolic maturity; grape health was excellent and in general healthy grapes entered the winery.

Harvest began on 16 August (3 days before the 2020 harvest) and finished on 1 October (the same days as the 2020 harvest), with only one pause due to the rain. Average production of the Castillo de Perelada vineyards was 3,600kg/ha (considerably less than the 10 year

average) and a 26% reduction on the 2020 harvest.

Both whites and rosés reached full maturity, with average alcohol content (13.0-13.5%), high total acidity, low pH with very good mouthfeel, aromatics, freshness and varietal expression.

Reds have medium intensity of colour and aroma, medium alcohol content (14.0-14.5%), with balanced acidity, soft tannins structure and fully ripe profile, sufficient for ageing.'

- **Delfi Sanahuja, Oenology Director**

Perelada

RÍAS BAIXAS

DO Rías Baixas is vital to the region, accounting for 65% of the total Galician volume.

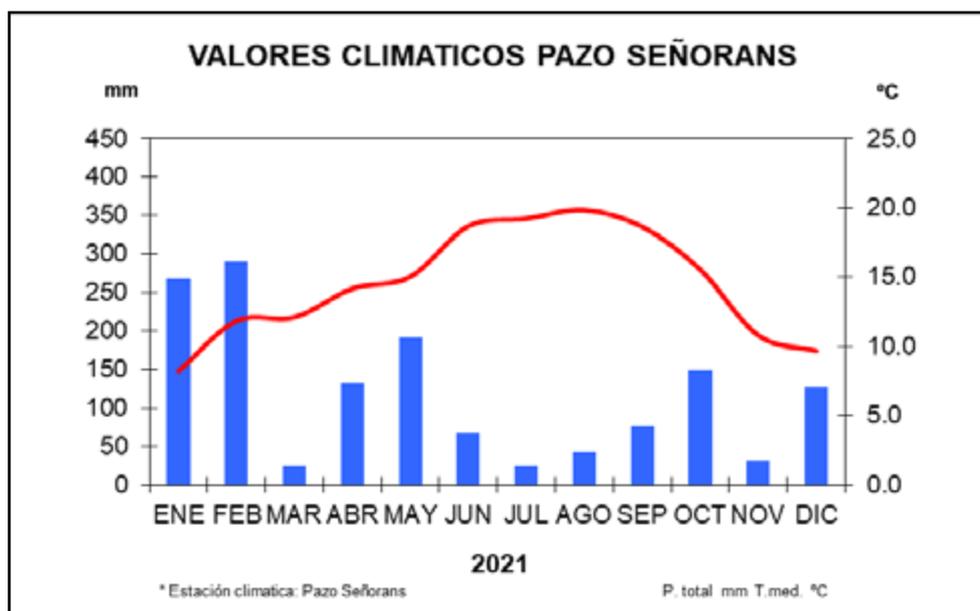
The growing season started 10-15 days early in Rías Baixas due to a mild winter with high humidity, followed by a warm, dry spring. Summer was also dry until the heavens opened towards the end of June leading to a month of rain and colder temperatures. This prolonged the growing period by approximately 1 week compared with 2020. The harvest started in mid-September and is reported to be 27% higher compared with the previous year, with average yields of 10,455 kg per hectare, translating to 29.7 million litres.

Albarino has seen increasing demand and scarcity of grapes; with average grape prices having risen by 25-35%.

Pazo Señorans, Val do Salnés - 2021 was a normal year in terms of rainfall, the anomaly was that spring started dry and ended very

Temperature and rainfall recorded at Pazo Señorans

wet, resulting in more humidity than usual. Winemaker, Ana Quintela, had to be attentive to fungal diseases, however flowering and fruit set was good. The summer months that followed were mild, 0.5 degrees below average, which delayed envero (veraison) and ripening. During the September harvest, it was colder and wetter than usual. The harvest began in the third week of September.



BIERZO

Bierzo harvested 12.6 million kilos of grapes this year, 11% more than last year. Grapes were healthy, with very good maturation and slightly lower potential alcohol than in previous harvests.

A rainy winter and spring provided good water reserves for the growing season. Flowering began between the last week of May and first of June, which saw some considerable rainfall while vines were in full bloom. At the end of July, a week earlier than the previous harvest, envero began.

Bodegas Emilio Moro's Bierzo vineyards began picking on August 27, a harvest characterised by intermittent rainfall in late August and early September, which forced the team to occasionally stop picking.

LA MANCHA & MANCHUELA

Picking in La Mancha finished on 15 October, with a crop significantly smaller compared with 2020 after a difficult year in terms of weather. Spring frosts, excessive heat in late August and violent storms, with the occasional localised hailstorm in September, reduced the quantity of the harvest by up to 50% but not the quality.

Altolandon, DO Manchuela - their elevated location at 1100m above sea level meant harvest began as many were finishing, on 13 October. The harvest arrived on time and after the rains, which made Rosalia Molina nervous about disease for the first time in 20 years of winemaking, but thankfully everything was fine for this organic producer and grapes remained healthy as they reached the winery. Picking finished on 18 November, in what was an unusual year as red varieties, such as Garnacha, Bobal and Malbec were picked at the same time as whites. Quality is reported to be very good, grapes were mature, fresh and healthy.

JEREZ

The vintage was the earliest on record; the first fruit picked on 2 August in what was a short vintage due to low rainfall (a trend of the past 3 years). By early September the harvest had drawn to a close with the exception of grapes destined for the sweetest styles. Spring was very dry with frequent night-time frosts which favoured grape development. Summer temperatures were generally mild with the westerly Poniente wind dominating though there were some hot days in the run-up to harvest which affected some vineyards. Overall fruit quality was high with well-balanced sugars and acids. Yields were slightly higher than last year with 57.5 million kg destined for the traditional criaderas and soleras ageing process in Jerez.

months of July and August ... it seemed that the heat would mark the harvest, but at the beginning of September vines received 50 litres of rain. Further heavy downpours meant that we had to work hard in the vineyards, with more selection and less alcohol than in 2020. Then once again, rain stopped everything and the harvest was extended until 13 September; whites will be characterised by freshness and good acidity, more comparable to 2019 vintage although with more structure'.

VALENCIA

Celler del Roure, Valencia -

'From November to March the vineyards received a lot of rain and snow ... as late as 8 March, we were surprised by a further snowfall which covered the winery and the fields, turning them white; by then the vines were ready for bud break, which was less early than in 2020. More rain in May slightly delayed flowering and we had to work hard in the vineyard with copper and sulphur to avoid mildew problems. Summer brought moderate temperatures and more rain, which helped the plants through the hotter

Paco & Pablo at Celler del Roure



PORTUGAL

VINHO VERDE

Quintas do Homem, Vinho Verde weather conditions were normal for the region, with good overall vine health. Volumes were 30% down (compared to the high volume 2020 vintage). Quality is good with slightly lower alcohol.

TEJO

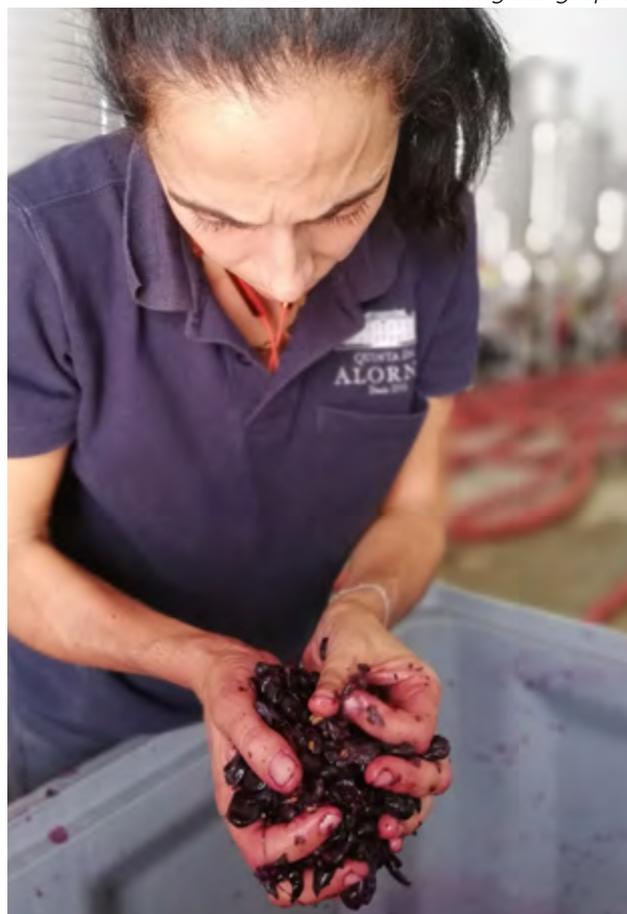
Quinta da Alorna, Tejo 'The year was fairly generous in quality of both white and red grapes. The elegance on reds is a characteristic we have been pursuing and this year managed to achieve. Reds have fine aromas and balanced palate weight from good climatic conditions and full maturation of the grapes, temperatures did not surpass 30°C during the day and nights were fresh.' **Marta Simões, winemaker**

DOURO

Real Companhia Velha, Douro 'Normal and dry conditions, with a mild winter, and average temperatures in spring and summer were standard. It was not a year of threats for the vineyards in our region. Harvest began as planned in good conditions, however moderate rain in mid-September caused fruit maturation to slow, resulting in a long and fresh harvest. Volumes were above the last 3 vintages but 10% less than an average vintage. Quality of the fruit was good, producing lighter, fresher

and less alcoholic wine styles than average. Pricing of the wine juice is stable but significant increase of cost of dry goods could generate increase in selling price.' **Rafael Molezun, RCV**

Marta at Alorna assessing the grapes



Harvesting by hand at RCV



FRANCE

France experienced the greatest drop in volume, losing one third or more of the total crop to adverse conditions. Catastrophic frost (which followed an early warm spell) was the main issue, with mildew and drought in some areas exacerbating the problem. Many top end wines will have limited availability and high demand, especially whites (in particular Loire, Chablis and Burgundy) will be in very limited supply – generally being sold by allocation only to existing customers.

At entry level volumes are scarce and prices up on all varietal whites, particularly Chardonnay. Red and rosé wines have less pressure on availability, however quality is mixed, with better wines demanding higher prices than 2020 sure to go quickly. The same is true on organic varietal wines; prices have soared and availability, particularly on whites is limited.

After a string of smaller vintages over the past five years, stocks in cellars were low, so the full impact of this year's shortfall will be felt immediately.

LANGUEDOC-ROUSSILLON AND MORE

Terres Fidèles 'Like all producers in the Languedoc- Rousillon, the key challenge we are facing is massively reduced yields on whites which is being reflected in significant cost increases on grape prices. We are happy with the quality of what we have, and confident we have enough to continue growing distribution of our wines but inevitably a proportion of those

increased costs will have to be passed on to consumers.

On Chardonnay and Pinot Noir there is better news. We have made more Montsable Chardonnay and Pinot Noir and quality looks great. There will be some moderate price increases but overall these wines should look even more competitive given the vintage. The early part of the year will see some exciting additions to our Roussillon range - we are delighted by what we have in barrel and are working on the labels at the moment ... watch this space'. **Fergal Tynan MW, Alliance Wine**



Picking in the South of France

CHABLIS

Domaine Bernard Defaix, lilly – ‘After the long and intense period of frost in early April, there was also hail in some areas. To add insult to injury, mildew came first, then the oidium in the middle of the season and botrytis towards the end. The weeds also had a good time in 2021 with heavy rainfall and unreliable weather conditions that meant regular ploughing wasn’t possible. A complicated year and quite a lot of new white hair!

Harvesting was also a run of the gauntlet between grape maturity and avoiding the rains.

But thankfully between showers the weather was good which allowed us to pick. Volumes are low, with really catastrophic results with Petit Chablis, Bourgogne Blanc, Rully 1^{er} Cru whites and Rully village red. On the other appellations, the results are moderate with significant disparities by area.

Qualitatively, we are back to a very classic Bourgogne style (a bit forgotten during the recent warm vintages) with lean, mineral character and a nice fineness. This vintage will require time as well as attention and work in the cellar in order to reach the perfect balance’. **Helene Defaix**

ALSACE

Vignoble Klur, Katzenthal ‘We had a particularly rainy spring and summer which favored the development of both downy mildew and oidium. Some grape varieties such as Pinot Noir suffered major damage but Riesling did better. The qualities of the wines are excellent but the quantities are small, which is disappointing given we had escaped the spring frosts and a good harvest had been predicted ... but that’s nature!’ **Elisa, Francine and Clément**

Harvested grapes at Domaine Klur



BURGUNDY & BEAUJOLAIS

Extreme spring frosts and cool summer temperatures dictated matters in 2021, in what for most winegrowers was one of the most difficult years in memory. **Maison Chanzy** has reported 60% lost to frost in Bouzeron and as much as 80% in Puligny Montrachet.

The summer failed to improve the situation, with cool, wet weather from May to July. Winegrowers battled the threat of downy mildew and botrytis as a result. By mid-September potential alcohols were struggling to surpass 10%. By the third week of September the clouds cleared bringing much needed sunshine to the remaining days of the growing season. The harvest came over a month later compared with 2020s short harvest, concluding on 2 October for Maison Chanzy. Sadly, 2021 will not be remembered for its whites, as there's simply not much of them!

Maison Chanzy - Winemaker **Max Blondelle** shares his experience – ‘After a cold winter and especially cool and wet spring, vines experienced a terrible episode of frost at the beginning of April postponing the bud break that had already begun and causing irreversible damage. On top of this, summer hail storms and strong disease pressure meant vines have really suffered in 2021.

The harvest began on 21 September, mainly with reds that were more advanced than the whites. The 2021 vintage is marked by big delays in maturity that never came to fruition. Potential alcoholic levels hovered around 11% vol. forced us to resort to chaptalization on almost all the cuvées.

The acquisition of a new press allowed us to control our pressings even more, vital on a vintage which was in danger of producing unwanted vegetal flavours. Alcoholic fermentation of white wines was made in oak for almost all the wines produced. The contribution of a slightly higher percentage than in 2020 as well as a good natural acidity



Free run juice from the press at Chanzy

should, in the long run, benefit the overall quality of the vintage.

For the reds, it was necessary to adapt the work to the state of maturity as well as the health of the grapes: rigorous sorting, greater extraction work especially in pigeage and macerations regularly exceeding 20 days.

The wines of the 2021 vintage are characterised by bright fruitiness, colours are more traditional ‘Burgundy,’ and by a freshness that will follow us from beginning to end. Once again, a larger percentage of new barrels and trials of new coopers should benefit the wines of this very special vintage.’

RHÔNE

Gonnet, Chateauneuf du Pape – ‘An old-style vintage with beautiful ageing potential. There was more fear than damage in the Châteauneuf-du-Pape vineyards in 2021 and the year passed without major difficulty, however never before did a spring frost come so close to the heart of the Châteauneuf-du-Pape vineyard, raising fears of damage on the early-budding varieties, Grenache, Syrah and Bourboulenc. Fortunately, this didn’t happen.

Nevertheless, the 2021 vintage is atypical and we have to look back 15 years to find similar climatic conditions or wine profiles. During the night of 7-8 April 2021, a cold episode affected almost all of France’s agriculture. The windy climate and proximity of the Rhône River meant that the Châteauneuf-du-Pape vineyards were more spared than most places. This exceptional climatic event affected the borders of the vineyards, where temperatures of -1.5°C were reported (against - 7°C in other areas in the Vaucluse). After a particularly mild

winter (+2.5°C above average in February) and a very cool spring, came a summer marked with several short, very hot episodes. Summer rainfall was low, but thanks to beautiful rain showers in early August, the maturing process of the grapes did not suffer from major water stress.

At the end of the summer, it was clear that the 2021 vintage would be a late one, a consequence of a rather long vegetative cycle (due to cool summer nights, among other factors), but also a vintage of uneven yields between the parcels that were affected by the frost and those that were not. By early September, the vineyards were in a perfect sanitary state, having been spared by mildew and showing little susceptibility to oidium. Storms around the autumn equinox slowed down the harvesting work, and in some cases, forced the vintners to change their picking process so as to adapt to the requirements of a vintage that is already described as a ‘winegrowers’ vintage’. The stripping of some parcels had a positive impact as it allowed the berries to mature more quickly while preserving their quality potential. The last plots were harvested early October.

The first juices suggest lower alcohol degrees than in previous years (around 14 %) and intense colour. The beautiful acidity of the vintage bears the promise of good aging potential, but the wines can also be drunk and enjoyed in their youth. The 2021 crop will be 20 to 25% below average in quantity’.

Kelly Gonnet

BORDEAUX

Olivier Cazenave, Bordeaux 'A difficult and stressful vintage with the big frost in April and then heavy rains in June/July, followed by dry conditions until mid-September. All a lot for a plant even as resistant as the vine to cope with!

Even after checking all the grapes before harvest, we were very anxious and not optimistic... fragile skins, small berries, diseases, some rotten grapes, low level of sugar ... led us to expect a quality similar to 2013... but on tasting the grapes, they were good and an easy vinification followed (the advantage of low alcohol and nice acidity) and after some sugar additions (to get 12/12.5° alcohol and bring more palate weight) the results have been surprisingly good! Not 2020 style of course (which is not by the way necessarily a bad thing ...) but balanced,

retaining nice freshness and complex fruit ... round and easy drinking for sure' **Olivier Cazenave, winemaker**

PROVENCE

An unusually mild winter brought about early budding; unfortunately, this was followed by an unprecedented chain of night frosts in spring. Summer months were very dry without being too hot. The CIVP said 'sanitary conditions in many vineyards' had been good during summer and there were signs that the impact from spring frosts may not be as bad as initially feared. CIVP estimates for three .AOCs - Côtes de Provence up 3% in volume vs. 2020, in line with the average of the last 15 years. Côteaux d'Aix en Provence down 10% vs. 2020, and for producers in Côteaux Varois en Provence, such as Château de Escarelle, they are between -5% and 0% vs. 2020 depending



Ploughing with horses at Olivier Cazenave

on their location.

Château de L'Escarelle, Provence:

Technological investments in the vineyard combined with new farming practices and relentless hard work during the last six months of the growing season ensured a healthy and fully mature crop. Cover crop, and careful water management were essential in avoiding stunted grape maturity.

Low rainfall and cool nights in September helped the grapes to reach maturity and a perfect balance of potential alcohol and concentration. The estate was at a sufficient distance from the wildfires that damaged 30

estates in the Var area of Provence in August. Harvest was two weeks later than usual, and took place over several weeks, 'à la carte', waiting for the optimum maturity plot by plot, without the risk of disease. As a result, juices were clear with great balance of sugar, acidity and very aromatic. The winery has reported that wines are nicely aromatic and show fine structure.



Alexandre Faure of Ch. de L'Escarelle assessing the ripeness of the grapes

ITALY

A difficult vintage to generalize due to varied weather conditions across the regions; for some it was excellent, but for others, challenging. Late frosts had a profound impact, particularly in the central northern regions, whilst extreme summer temperatures and lack of rain caused concern on the south, combined with local hail and storms. Having said all this, total volumes have not suffered too greatly compared to elsewhere in Europe, down 9% compared with 2020 (approx. 44 mhl according to OIV estimates). Retaining Italy's position ahead of France and Spain in terms of volume.

Winter was mild, with abundant rainfall, followed by a regular spring and the vines developing well until April, when on two separate occasions (7-8 and 15 April) severe frost struck, effecting the north and large parts of Tuscany, Lazio, Umbria and the Adriatic coastline. A warm June was followed by July hail and very dry conditions, particularly in the south, mitigated by September rains. The classic areas of Piemonte and Tuscany have had a challenging vintage, whilst producers in Valpolicella and Friuli have had an excellent one!

Prices for Prosecco, Pinot Grigio DOC and Pinot Grigio IGT are all up. Puglia and Sicily both had good-sized crops, with good availability on international varieties and organic wines. Rises in the costs of dry goods and commodities, combined with increased wine prices, will likely lead to an increase in the cost of wines on the shelf which will challenge consumer buying habits.

PIEMONTE

Volume down 10% (2.43million hectolitres) - After a cold and snowy winter, spring was mild, however severe April frosts had a dramatic effect on some valleys and producers. A cool, dry May was followed by a warm June, limiting disease, however hail caused issues on some sites in Roero and Alto Piemonte. **Produttori del Gavi, Piemonte** – volumes are 20% down compared with 2020, with excellent quality.

TRENTINO & ALTO ADIGE

Volume down 10% (1.17million hectolitres). Weather extremes had less impact here than expected, in part due to late budding and flowering. However, the Trentino area was hit by hail. Alto Adige fared much better, with an excellent vintage predicted.

VENETO

Volume down 7% (10.8 million hectolitres) – the combination of spring frosts and summer hailstorms affected some but not all producers. Pinot Grigio has been most affected by the extreme weather and prices are up, whilst Glera seems to be of optimum quality. Valpolicella is reporting an excellent quality vintage.

TUSCANY

Volume down 25% (1.65 million hectolitres). A rainy winter filled aquifers but the caused extensive damage in the lower areas of the region, especially to Sangiovese. After a benevolent May, the summer was hot and dry with extreme temperatures, causing hydric stress and heat damage to the vines. A complex and challenging vintage for most.

Riecine, Tuscany – A vintage characterised by extreme climatic events. The winter and early spring were extraordinarily rainy, and this period also unfortunately concluded with temperatures that were below average, culminating in late frosts on 7-9 April, with minimum temperatures of respectively -5° C, -7.6° C and -2.3° C, at around the time of bud-break; this caused some damage, if only to a minor degree.

In contrast, the second half of May saw a sudden increase in temperatures, followed by a general reduction in rainfall (which was almost absent for several weeks), however winter rains ensured that the roots of the vines had access to water, and there was therefore no interruption to their growth. *Véraison* began as usual around the first week in August and continued regularly until the third week

of the month, when the fruit had completely changed colour.

At the end of August we removed leaves, to expose the fruit to direct sunlight to allow for complete ripening. Harvest on reds destined for Riecine's rosé started on 20 September, 28 September for the Merlot, and 2 September for the Sangiovese for the red wines. Grape health was perfect, thanks in part to our adoption as from this year of integrated pest management against *Lobesia Botrana* (the European grapevine moth) by using sexual confusion, which produced excellent results.

Analysis of the grapes was excellent, and on the side of higher acidity, which was a little more marked than in recent vintages. Alcohol levels were normal, between 12.5 and 14% and overall evaluation for this vintage of 4.5 points out of 5.

San Polino, Tuscany – 'The summer of 2021 was hot; in Montalcino temperatures soared in July and August allowing a harvest of amazingly



Gigi and Katia in the vineyards at San Polino

healthy, if not overly abundant grapes ... The year started well, with good rainfall and cold temperatures in January. As usual we pruned late, catching the waning moon through the first 2 weeks of March which fortunately coincided with a fortnight of dry but cold weather.

Our practice in the vineyard is to prune as the moon wanes because the sap gets pulled back into the plant. We do this for 3 specific reasons, firstly to prevent the nutrient rich sap from dripping out of the plant, secondly to protect the vines from infection by pathogens as dry cuts are healthier than cuts made when the sap is rising, and thirdly to promote later leaf budding in the vines. This later foliation certainly benefited us this year as by mid-March temperatures had shot down to below freezing at night. Vineyards that were already in leaf suffered terribly from frost damage which then negatively impacted the yield of the harvests. Luckily we were for the most part unaffected by this and regular rainfall throughout April and May, with the usual temperatures expected for the late spring brought the vineyards to perfect fruiting and healthy young grape clusters.

Trouble arrived by the end of June with temperatures rising to 33°C during the hottest part of the day and peaks of 37°C during August (... remember that temperature measurements are made in the shade) and the vineyard was much, much hotter! Yet ironically excessive heat can sometimes be of advantage to the viticulturist. Under pressure, heat-stressed vines will close the stomata of their leaves as protection from excessive UV rays and go into a state of semi-dormancy. Thus while grape maturation is delayed the plant does not suffer overly. This is exactly what happened this summer at San Polino. Then blessed with rainfall at the end of August, cooling temperatures

and days of abundant rainfall at the end September the vines were able to exploit a 'second summer' of dry, warm days and cold nights in October to bring to conclusion a beautiful harvest by 15 October.

More than ever it was touch and go this year but we made it. The rules governing Brunello di Montalcino allow for a yield of 7000 kg per hectare (around 7000 bottles). To keep quality in our wines we normally bring in around 4600 kg while this year we were down to 4200kg. The grapes tended to be smaller than usual with thicker skins (so less juice). However, the structure of a wine resides in the skins; the colours, tannins and aroma, which were great on all three counts. We carried out spontaneous fermentations in large wooden tronic vats, believing this keeps our wines more in character with their soils and close environment as 'terroir-driven wines'. We were worried this year because high sugar levels and drier grapes than usual can lead to problems in this magical alchemical moment in



San Polino Brunello bread

the life of a wine. Luckily all went well and with an alcohol of around 14.5% ... all is good indeed.

I took a bowl of spontaneously fermenting must and using the live indigenous *saccharomyces* yeast to make bread – successfully! I then took a recipe from Pliny the Elder – yes, him – to dry the yeasts which are now stored in glass jars on the kitchen shelf) ... 2021 has been the year where climate change has made itself felt leaving no margin of doubt as to the power it can and will exert. As winemakers we have to get to grips with this issue. Over the past 30 years at San Polino we have been working to find ways to practice a viticulture that is sustainable and environmentally regenerative. We are now proud to be initiating a sustainability project in collaboration with the Brunello Consortium and the community of Montalcino'. **Katia Nussbaum**

MARCHE

Volume down 13% (0.78 million hectolitres) - 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.

ABRUZZO

Volume down 18% (2.88 million hectolitres) - 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 did cause problems of drought and severe water stress, especially on hillside vineyards.

CAMPANIA

Volume increase 5% (0.75 million hectolitres) - 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.

PUGLIA

Volume down 5% (8.5 million hectolitres) - a vintage shaped by the drought conditions that global persisted throughout the summer; results depended on the growers' capacity to intervene with irrigation.

SARDINIA

Volumes up 20% (0.436 million hectolitres) - A 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).

SICILY

Volumes up 9% (3.99 million hectolitres) – a regular vintage with increased volumes; the winter provided abundant water reserves to balance a dry spring and heatwaves in summer. A dry spring with cool temperatures was followed by an early summer with normal, warm temperatures, then record-breaking heatwaves were experienced in August, which caused some hydric stress and heat damage to vines, especially in the east of Sicily. Towards the end of August temperatures lowered.

Producers like **Rallo Azienda Agricola** in the west of Sicily managed the heat better than in other parts. They have reported good levels of production and quality.



Andrea Vesco assessing the vineyards in the Scilian hills

ENGLAND

All Angels, Berkshire: The year started wet - between October and February we had three times the average rainfall. We pruned late and adopted techniques to limit damage from later frost. April and May were relatively dry but the frosts were tough ... the worst frost for 60 years! During those two months we worked through the night to fight the frosts on 27 occasions and 17 nights in a row. The hard work paid off and we survived with negligible frost damage unlike many vineyards; that is important to us as we only use grapes from our vineyards in producing All Angels Sparkling Wines - provenance is key so we don't buy in grapes grown by others to supplement, even in low volume vintages.

There was a relatively stable period of weather for a few weeks but flowering suffered from some cold, wet weather and we saw that later in the year with irregularity in the bunches. The remaining growing period was mixed. Largely it was warm, wet and humid - conditions which are ideal for downy mildew and botrytis! Again we were lucky and didn't suffer any of this until late August and were able to react quickly to remove diseased leaves to eliminate mildew and removed bunches that

looked most at risk from botrytis.

The end of summer was cold and that delayed harvest everywhere. There was then a period of stable warmth which helped the ripening process enormously. Even so, it was a case of waiting as long as possible to harvest. The Chardonnay harvest was a challenge, a fine balancing act between leaving the grapes to gain sugar, against disease risk and impending wet weather that would just dilute the flavour. We harvested between 8 October and 30 October, not the latest but close to it.

So where did we end up? We were pleased with how the year panned out and that the enormous and constant hard work paid off. Yields across all varieties were up on 2020. Sugars and acidity were on a par with last year and the flavours for Pinot Meunier, Pinot Gris and Pinot Noir were outstanding. Chardonnay was the most challenging and while the acidity is pretty good, sugars are down a little on last year - the additional chaptalisation permission will help resolve this. After tasting all pressings we're delighted with how they are showing: the Chardonnay from the Church Block was the one we were most nervous about but all of this has gone into French oak barrels and the effect has been not only pleasing but very exciting! Emma Rice has once again waved her magic wand'. **Mark Darley, All Angels proprietor**



Barrel work at All Angels

THE REST OF EUROPE

Greece, Slovenia, Croatia, Slovakia and Austria all experienced lower volumes in 2021, however other such as Germany, the fourth largest European producer, saw an increase of 4%. Romania saw the greatest increase with a 29% increase on the 5 year average. Bulgaria +7%, Hungary +6%. Georgia and Moldova also saw significant increases in volume, all adding up to an overall growth in total European production despite the major hurdles suffered elsewhere.

GERMANY

Max Ferd. Richter, Mosel - Spring brought frost and little rain, with low temperatures, causing late bud-burst. May brought rain and flowering took place in good conditions at the end of June, nearly four weeks later than in past vintages; a clear indication of the impact of climate change on the region.

Rain continued throughout summer, affecting the young grapes and causing fungal diseases. Protecting the grapes was crucial, in what we already knew would be a small harvest. We had to spray more than usual to fight mildew, phomopsis (black rot) and botrytis. Warm, dry conditions in late September ripened the grapes but the harvest was very late, starting three weeks late, on 11 October, finishing in early November. Despite the difficulties of the summer our grapes were very healthy. We can expect wines with clean aromatic fruit structure, great complexity and mineral intensity. The majority of wines from 2021

will be QBA and Kabinett wines. Spätlese and Auslese are a rare exception, though we did manage to select a TBA from the Wehlener Sonnenuhr vineyard. As of now we can compare the 2021 vintage with 2004, 1996 and 1991.

AUSTRIA

Ferdinand Meyr, Funkstille, Austria, 'Let me sum up this extraordinary vintage ... late budding and late flowering, late harvest and sufficient precipitation in 2021. All fingers and toes were crossed for good weather in September and October and it happened, resulting in the best September since 1975 and a beautiful October.

Summer was not particularly hot and in the middle of August we were all a little worried about whether we would be able to harvest ripe grapes. Especially from the cooler areas like Wachau or my vineyards in the Northwestern Krems Valley. At the end of August I had just 40 Oechsle on some of the Riesling vineyards; but September changed and we ended up with a very healthy crop which we were able to harvest from mid-October to the beginning of November.

Acidity levels are quite high, especially for Riesling. Grüner has around 6.5 to 7g/l but this is great and not a problem at all. But Riesling from cooler sites have 10 to 12 g/l due to the cool nights and late year. Overall it's a great Grüner Veltliner year, low pH and fantastic fresh fruit expression.

Riesling is great as well in warmer sites and in the cooler locations we need to leave some residual sugar in order to get it in balance. Most winegrowers will de-acidify their wines but that makes the wines thin and I don't want to do that at all. For red wines in Austria the same, cooler vintage, fresh acidity but not unripe tannins so this could be a great vintage for red wines as well.

We had a tornado in part of Weinviertel, close to the Czech Republic border on 24 June and it destroyed quite a lot of vineyards but overall quantity is good, with no real problems with frost this year. Grüner Veltliner volumes are average and red wine is slightly lower. Wine prices are stable but dry goods are getting more and more expensive so at some point small price adjustments are inevitable.'

Ferdinand Meyr

ROMANIA

Cramele Recas, Romania 2021 was a challenging vintage with extreme weather conditions in some the country, but perfect weather in others; with some regions producing truly outstanding wines, and good quality overall but with moderate quantities.

A cold spring in the west of Romania where Recas is located was useful in that it delayed bud-burst until the end of May and thereby we avoided the frost damage which caused such losses across Europe. In Recas from early June summer started very abruptly with warm dry weather right through till end of October, but without the excessive hot spells of 2020, averaging 30-35°C daytime temperatures until mid-September.

This was in short almost perfect growing conditions, with low humidity and low disease pressure, followed by a long mild autumn which allowed us to harvest at optimum ripeness levels. We started harvesting on 3 September and finished by 10 October (whilst in the east of the country, in Pestera and Odobesti it started on 8 September and finished around 15 November due to the more erratic weather).

The particularly unusual weather conditions in Recas meant that it was both the shortest harvest on record, with 16,000 tons processed in just over a month, but at the same time also our latest, starting and finishing harvest for more than 25 years.

A particular feature of 2021 was the fast ripening of the grapes in the last period of their evolution; which made it hard to manage picking at the optimal ripeness. This made our investments in the past year particularly worthwhile - with our 8th harvesting machine and over 3 million litres in new fermentation tanks meaning that we were able to quickly pick all grapes at the right time.

Our experienced, all female winemaking team pulled out all the stops and have produced some exceptional wines; I would say highlights are the red wines, particularly Merlot, Feteasca Neagra and Syrah, and also whites from Sauvignon Blanc,, with is already filtering through Chardonnay and Viognier which were excellent!

CALIFORNIA

With lower volumes than average coming from the Central Valley and demand high, pricing is stable but under pressure. Shipping out of California remains challenging and forward planning is essential in order to mitigate delays. The harvest itself was early in many of California's regions, ranging from a week to several weeks ahead of average. The ongoing drought presented challenges for winegrowers, resulting in reduced yields, but quality and concentration are excellent. The total harvest is estimated to be 3.6 million tons of grapes this year, down from a four million average.

NAPA VALLEY

Vintners are extremely excited about the quality of this year's vintage. The growing season was mild and posed no serious climatic issues, though lack of rainfall and

a low water table throughout the valley presented challenges. Due to drought, berries were very small compared to previous years, and yields in some areas were down 20% - 30%.

SONOMA COUNTY

experienced an excellent growing season overall, with a cold start progressing to a warm and fast finish. 2021 was free of forest fires, Sonoma also didn't experience long, lingering heat waves. Harvest started slightly early this year and progressed quickly. The drought brought lower yields, but created intense flavours in the fruit. Since there was no smoke exposure, the crop sizes for Pinot Noir and Cabernet Sauvignon will be larger than in 2020. Vintners are reporting exceptional quality fruit across all the major varieties, with great intensity and concentration of flavours.



Night harvesting at Paul Hobbs in Napa

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