

VINTAGGE REEPORT



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All over the world, our growers have been affected by some of the most extreme conditions in recent history. Whether that be wildfires, drought, flooding, political instability or even war, 2024 presented some very serious challenges.

We are extremely thankful that luckily for our partners, the damage has been limited to material effects, but these losses will still take time to repair.

With regards to the harvest itself, the likes of hail and torrential downpours to continued drought all led to a very complex vintage no matter where you were on the globe. Whilst most countries fared poorly in terms of quantity – with even those who improved on last year, still below the previous 5-year average – most of our growers rallied and still managed to produce wines of distinction. Even if having to favour a slightly leaner style in some cases or noting that the wines may mature a little quicker than more classic vintages, they were able to prosper in a difficult time for all.



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VINTAGE REPORT
2024

The 2024 wine vintage in **Italy** is a combination of climatic challenges and promising quality. The UIV- Unione Italiana Vini, reports an overall increase of 7% compared to 2023, but remains 12.8% below the five-year average. Climatic adversities in several regions have divided the peninsula into two macro-areas. In the North, early development of the vine has required an increase in vineyard management; whilst in the South, the main problem has been the management of water resources.

The North of Italy recorded stable production levels - there was recovery in the Centre of Italy compared to last year - and the South continues to decline. Veneto faced significant weather-related challenges. The region experienced one of the wettest springs in three decades, followed by frost in April affecting the Soave area. However, a dry August improved grape ripeness and quality, indicating the potential of high-quality wines. The volume overall in Veneto remains stable.

Despite a mild winter and excessive rainfall until June, stable weather in the summer allowed healthy vine development in Piedmont. The Nebbiolo grape benefited from these conditions, producing elegant and well-structured wines. Piedmont reported an increase of 10% vs 2023. In Tuscany, frequent rainfall posed challenges during harvest especially in the Chianti Classico area. Overall, the 2024 vintage is anticipated to produce elegant and balanced wines. Tuscany reported an increase of 30% compared to 2023.



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2024

Puglia had significant challenges due to heat and drought; producers who managed their vineyards effectively have achieved excellent quality. The wine production increased by 18% compared to the previous year, however it is still below the five-year average.

Sicily experienced a considerable reduction in grape production - 16% due to heat and drought. Yields were low, but the grapes are of premium quality, promising outstanding wines.

Despite the climate challenges, the overall quality of the wines is reported to be good, with several regions achieving excellent results. Producers are optimistic about the balance and elegance of the wines in most of the regions.



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The 2024 vintage in **France** was shaped by significant weather variations across the country's major wine regions, leading to diverse outcomes in terms of yields, quality and style. Bordeaux faced a complex growing season, but with an overall decent outcome for both red and white wines. A warm, dry spring advanced budburst, but June's cool and wet conditions disrupted flowering, leading to some uneven fruit set. This particularly impacted Merlot, reducing yields by up to 15% in some areas. Sporadic storms in July and August provided necessary water, but heightened disease pressure, particularly mildew which required a lot of management.

September's warm days and cool nights enabled a relatively even ripening season with a reasonably late harvest, especially for Cabernet Sauvignon. Overall, yields were slightly below the ten-year average, but quality appears promising with concentrated flavours, balanced acidity and ripe tannins. In Burgundy, a mild winter led to early flowering in spring, but hailstorms in late May and early June reduced yields, particularly in the Côte de Beaune. Chablis was hit terribly by mildew reducing volumes by up to 80%, for some producers it was the worst vintage in a lifetime. The summer was warm with sufficient rainfall to maintain vine health.

Vineyard management, including green harvesting and canopy control, was crucial. The reds exhibit high acidity and fine tannins, while the whites have a balance of richness and minerality, though quantities are limited in some appellations.



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Champagne faced a cool growing season with moderate rainfall. Late frost in April caused some vine damage, especially in lower-lying areas, but the better sites were left unaffected. Some summer rains helped refresh the vineyard, but good summer spells of sunshine allowed for a good-sized crop. Harvest started in early October under favourable weather conditions. Grapes showed high acidity and moderate sugar levels, suggesting wines with good precision and aging potential. The Northern Rhône experienced a hot, dry summer, with rain in mid-August aiding ripening for Syrah. The resulting wines are aromatic and concentrated. Once again, drought was a big issue in the Southern Rhône, which reduced yields, especially for Grenache. Vineyard practices, such as leaf thinning and bunch reduction helped achieve phenolic maturity. Wines from the region are concentrated and complex, with a surprisingly balanced freshness considering the conditions.

The Loire Valley encountered a wet spring that increased disease pressure, necessitating vigilant vineyard management. Recent vintages with these conditions have encouraged some winemakers to move away from organic growing to ensure a decently sized crop. A warm, dry summer allowed Sauvignon Blanc and Chenin Blanc to ripen well, but September rains complicated harvesting for later varieties.

Early harvested grapes produced wines with bright acidity and strong aromatic profiles. Reds, particularly from Chinon and Saumur, show good freshness and balance.



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Alsace experienced a stable growing season with minor frost in April. Moderate summer temperatures were ideal and allowed for slow, even ripening. Dry, sunny weather in September benefited late-harvest varieties, such as Gewürztraminer and Riesling. The wines are aromatic with good balance and precision. Yields were slightly above average due to the lack of severe weather disruptions. A good year for Alsace!

Provence endured heatwaves in July and August, which caused some water stress. Late-August rains helped mitigate these effects. Harvest began early to preserve grape acidity. Rosé wines are fresh, with mineral and fruit-driven profiles. Red wines are structured and show potential for aging. The Languedoc-Roussillon region experienced a hot, dry growing season, with drought conditions reducing yields. Old vines were more resilient, producing concentrated fruit. September storms provided some relief but necessitated careful sorting during harvest. The resulting wines are bold, hearty and structured.

Greece was one of the main countries affected by drought and extreme temperatures. This in turn led to an early harvest to try to maintain balance and acidity. Wines were well made and grapes were in exceptional condition due to the lack of disease pressure. This was exacerbated in Santorini, with the shortest harvest on record.



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2024

Perhaps the most challenging of them all, 2024 proved to be a wet and difficult vintage for **Spain**, whereby harvest in many areas were brought forward to avoid loss of fruit to rot and other fungal diseases. Whilst traditionally cooler and wetter areas fared ok (Rias Baixas down just 5% on 2023), warmer regions such as Rioja and Ribera del Duero fared more poorly with many wineries abandoning vineyards altogether due to either poor fruit set (from hail during the spring and summer months), to loss of fruit at a very wet harvest. The Mediterranean coast, especially further south, was the exception with continued drought in Jumilla, although water reserves were replenished in Andalucia, especially with the arrival of the Dana in the winter (which whilst Andalucia fared ok, the devastation in Valencia was somewhat catastrophic, with many even losing their lives).

Portugal was hit by a cooler and wetter than average year, which helped to slow ripening, creating some nicely balance wines, but with some losses to mildews. Through August rainfall was minimal, resulting in a good véraison and near optimal conditions for picking< which many are calling a “classic” vintage.

It was clear to see that 2024 was a challenge with some incredibly wet weather and one of the worst vintages in history for **United Kingdom**. Losses ranged from between 20% to a whopping 70% of crop with some vineyards abandoned entirely.

The UK is fortunate that it has good reserves of wine, so this short harvest will be less of a concern, but wine production was still an issue (especially for Reds and Rosés) as grapes weren't able to hit ripeness. There will of course be some stand out wines, but these will be the exception as most consider the harvest to be good at best.



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In **Germany**, a challenging vintage in some areas, with some late frosts causing lower yields and low production in many areas including Mosel, Nahe and Baden. Luckily Rheingau was relatively unharmed. It was a cool vintage stylistically, so expect very fresh wines.

On the other hand, **Austria** experienced a very unusually early vintage this year due to some early budding, with some harvesting starting in mid-August. Overall, a lower harvest volume than the previous year, which has impacted prices slightly. Young wines so far are showing great flavour and acid structure, and with the warm summer weather some higher alcohols.

A challenging year was experienced in **Hungary** due to extreme heat waves and sporadic rainfall. The harvest was quite difficult, with everything ripening at the same time. This has resulted in some slightly lower yields than normal; however, some exceptional quality across the board, particularly with red wines.

The overriding concern in **Lebanon** was of course the ongoing conflict, with some concerned they may not be able to complete harvest at all. For our partners at IXSIR however, they managed an exceptional harvest, even with the earlier picking as tensions loomed in the area. With the earlier harvesting of grapes, they are expecting aromatic whites and structured reds with a backbone of acidity.

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South Africa experienced an unusually difficult vintage, characterised by floods, frost and strong winds, with strong variability across the country. Despite this, there was optimal ripening conditions and a relatively dry period before harvesting, so overall quality was good with some small berries. The total production was down 7% on 2023. Producers remained resilient and wines are expected to be excellent.

A small but beautiful vintage, with plenty of clean fruit and low yields was heralded by **New Zealand** this year. Expect Sauvignon Blancs with great freshness and a ripe fruit profile. Whilst there was strong variability in weather across the country, some producers have noted it as an outstanding vintage.

Another year of smaller vintage than usual for **Australia**, with some very early harvesting compared to normal. Production of white wine has grown in line with domestic and export demand increasing. For some regions it will be an outstanding vintage with some very age-worthy wines.



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Another challenging year for **Argentina**, but thankfully resulting in higher yields and quality compared to the turbulent 2023.

Significant snowfall in the Andes set a positive outlook with the promise of higher water reserves. Throughout the growing season Mendoza had consistently high temperatures, but the resulting wines are showing cool climate characteristics, which many producers are linking to the effects of the vines adapting to climate change.

In Calchaquí, Zonda (hot, sandy, high-altitude winds) were present for most of the month of November, which damaged huge quantities of shoots and buds, considerably lowering yields. Overall, not as low as the prior year, which was ravaged by late season frosts. In **Patagonia**, some producers battled with frost again this year, but the consensus was a year of success with high quality, elegant wines.

After one of the longest harvests in recorded history, **Chile** has produced some outstanding wines from the 2024 vintage. It was certainly a tale of two halves, with Northern regions such as Elqui and Limari bringing forward the harvest by 2 weeks after experiencing earlier budding and limitations on irrigation. Centrally in Maipo many described a 'Bordelais' year – cool, cloudy, lower UV levels. Careful management was needed throughout to ensure full spectrum ripening. Overall yields are up to 15% lower than average, but quality in many cases is regarded as exceptional.



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Brazil suffered a catastrophic disaster in the Rio Grande do Sul in April region with severe flooding leaving vines submerged underwater, and landslides destroying wineries. It's estimated that 20% of production was impacted. It's expected that there will be varying outcomes of quality with wines varying by region and producer.

It was a very challenging year for **Uruguay** in 2024 with extreme weather to contend causing heatwaves and flooding. On the positive side, there have been some very expressive examples of Albariño and Pinot Noir. Other grape varieties ripened very slowly, and as a result there are lower alcohol levels, more vibrant acidity and freshness.

In most regions it was a classic harvest in the **USA**.

In Oregon, Willamette Valley was characteristically classic, with lower alcohol levels, vibrant acidity and an abundance of fruit.

Central Valley had above average temperatures throughout summer and reported good fruit quality, particularly in Lodi.



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Napa Valley experienced an incredibly hot year, with 40 days of temperatures over 38°C; however, the higher rainfall over winter provided the vines with adequate water to maintain. Night-time picking earlier in the season was key.

Sonoma and Coastal areas were a classic by the book vintage; whilst in Washington it was a hot vintage throughout, but temperatures dropped at the end of the growing season, which slowed down ripening and resulted in high fruit quality.

Overall, 2024 showed resilience to climate challenges, with regions reporting good to excellent quality and yield demonstrating the adaptability of US producers to endure varying weather conditions.



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