

## AUSTRIA: LESS IN MORE

by Peter Moser

The climatic conditions in 2006 cannot be summed up easily. After a long, severe winter, followed by regional hail showers in spring, blossoming came relatively late amidst constantly changing weather – from cold to warm, from sun to rain. July was extremely hot and dry. Most vines, however, did not suffer. Rains in August abetted the water deficit from July, but it was a rather cold month and the sun did not often make it through the clouds. It returned, however, for about two months in early September. Daily temperatures were up, at night it was rather cool, which provided the grapes perfect conditions for balanced ripening while preserving their delicate aromas.

First estimates suggest that Austria harvested 2.4 million hectolitres of wine in 2006, seven percent more than last year. Nonetheless, 2006 remains five percent below the average volume over the past five harvests. The principal reason for the reduced yields was poor berry set during the rains during blossom, which heavily affected Grüner Veltliner. Thus, the two largest wine growing areas, Weinviertel and Kamptal, harvest slightly less than 2005. Burgenland, on the other hand, rose in volume by seven percent, but was still four percent below its long term average.

Styria is the big winner in 2006. The long, dry autumn made both good volumes and quality possible. 177,600 hectolitres were harvested, which is slightly above the already large 2005 crop. Two thirds of all Styrian wine is marketed directly by the winery – and the estates there enjoy some of the highest average prices in the country.

Winemakers consider the quality level of the 2006 vintage to be high for all varieties. Healthy grapes with ripe must weights and a surprisingly fresh

acidity – due to the cool, wet August – have set the stage for an above average year. The only drawback is the fact that the light wines so sought after in the market will only be available in small quantities due to the high levels of sugar. For reds it appears to be an excellent year. Zweigelt has ripened better than over the past several vintages – and the late varieties did as well as the early ripening varieties such as St. Laurent and Frühburgunder, all of which were harvested under perfect conditions.

Josef Pleil, president of the wine-growers' association, characterizes the market developments as follows: „Prices for bulk wines will rise because of the limited quantities. Thus, bottled wines are likely to see some increase as well. It will, however, be moderate.“ On the other hand, Willi Balanjuk, managing director of Wine Burgenland, sees no upward movement: „We have sufficient volumes to continue to develop our markets. Poor berry set is a natural form of crop reduction.“ ■

## BULGARIA: SOME FRESH AIR

by Elissaveta Velianova

After the notoriously poor harvests in 2004 and 2005, the much awaited 2006 vintage brought a breath of fresh air for Bulgarian winemakers. The Executive Agency on Vine and Wine forecasts that over 300,000 tonnes were harvested, a 23% increase over 2005. Expectations are that both quantity and quality improvements will allow wineries to bring production back to the 2003 levels, when 1.5 million hectolitres of wine were made. Grape quality is good, but both growers and winemakers had originally expected an even better vintage.

Two heavy rainfalls in mid September and at the beginning of October affected quality. However, these showers were followed by warm, sunny weather, which prolonged the

growing season above the timelines typical for the country. While favourable weather conditions allowed the red grapes to reach 24 to 26 Brix, the white wines show a zesty freshness. The year was thus particularly suitable for the earlier ripening Merlot but, with a few exceptions, the result for Cabernet Sauvignon harvested later in the season was less homogenous. The improved quality has, however, in spite of the volume, kept the average prices above 2005 levels – and for the first time the demand for white varieties exceeded that for red. Chardonnay, Sauvignon Blanc and Traminer fetched between 0,40 to 0,57 € a kilogramme, which is 20% above the 2005 prices. On the other hand, rapid growth in red grape plantings and the abundant harvest drove prices for Merlot, Cabernet Sauvignon and Cabernet Franc down to 0,23 €. Top quality red grapes, however, are still in high demand and their prices reached 0,61 €. Given the higher volume of new red vines planted the price gap between red and white varieties is expected to remain an issue for the coming years. ■

## CROATIA: HIGH HOPES

by Željko Suhadolnik

Were it not for spring rains in certain regions that affected flowering, and hail storms in August and early October, the vintage 2006 in Croatia would be unanimously considered excellent. Now, although the general evaluation of quality remains high, the quantity is down. The early fears that hail damage in August would affect quality were nullified by the sunny autumn weather. The October storms, however, completely destroyed, among others, the crop on the southern slopes of the Hvar island where Ivan Dolac grows Plavac Mali.

As many vintners harvested late, those who were spared brought in

grapes with high sugar levels and lively acidity, so that most Croatian enologists evaluate the total quality with four to five stars across the country's many growing regions. Quantity, however, is down about ten percent to 1.8 million hectolitres. Although exact data on total plantings and annual wine production do not exist, the Ministry of the Agriculture, Forestry and Water Resources estimates that there are about 50,000 hectares under the vine, about 40,000 of which are in full production, bringing in 3 million tones of grapes that make, on average, some 2 million hectolitres of wine. ■

## FRANCE: BUSINESS AS USUAL

by *Hervé Lalau and Bernard Burtschy*

**M**ost French press releases refer to 2006 as a classic vintage, which is certainly not the case. France experienced drought until July, a cold, rainy month of August and an unusual September. The only classic month was that of June, which was warm and sunny. Nor was much truly classic about the rains, either. Bordeaux, for instance, had only half their long term average from April to June, but a 15% surplus in July and August. However, on the whole, an Indian summer saved the crop. Conditions at harvest were by and large good, the grapes dry at the time of picking and the quality should be more than acceptable. In terms of quantity, production is estimated at around 53.9 million hectolitres, of which 24.1 million AOC. This is 1% more than in 2005, but 8 million less than in the record year of 1999.

In Bordeaux, 2006 will be a good vintage for the dry whites, which appear to have pleasing aromatic potential; but because of differences in maturity and the development of rot in some vineyards, the results are

more heterogeneous for the reds. With 6.3 million hectolitre of AOC it will be an average crop in terms of volume. Nonetheless it was 20% above what those responsible had hoped to see. Alsace brought in around 1.2 million hectolitre, with quality being good to very good. Here, August rainfalls limited the negative effects of the July drought. In Champagne, 2006 will be abundant. Translated into drinkable terms, 340 million bottles were produced, which should more than cover the current demand. Despite above average yields, phenolic maturity was high and acidity low - with both Chardonnay and Pinot Noir thought to have fared well. As would be expected, conditions were normal in the dry sunny Languedoc-Roussillon. The quality is described as good and the yield estimated at 16 million hectolitres, of which 10.7 harvested as Vin de Pays, a very slight increase over 2005.

A sunny September assured Burgundy a bevy of fine wines, especially in the Côte de Nuits. Sugar levels are high, for both whites and reds, with just enough acidity to sustain the structure. The Chardonnay from Chablis, Meursault and Mâconnais should show full, ripe fruit. The Côte de Beaune, however, was affected by rot in some places. Yields were similar to 2005 at 1.5 million hectolitres.

In the Loire Valley, the Muscadets show good maturity indexes with balanced acidity. Touraine and Anjou were more severely affected by drought in July and heavy rainfalls in mid-September, with a negative impact on the production of the late harvested Vouvray and Montlouis. Further inland, in Sancerre and Pouilly, harvest went nicely, with the crop in excellent sanitary state. The sauvignon blancs should be ripe, but elegant; the pinots noirs fruity and quite tannic. For the region as a whole, volume is estimated at about 2.6 million hectolitre. In the Rhône Valley, the crop is a little more than 3 million hectolitre, with a quality said to be quite similar to the excellent 2000 vintage. Provence should follow that same trend. ■

## GERMANY: ALL OR NOTHING

by Dr. Herman Pilz  
and Richard Grosche

In July it looked as if it would be a magnificent year for German winemakers. Sufficient rains during the winter, a slightly delayed blossom and then the hottest July ever recorded had set the stage for great expectations. Then, temperatures dropped and August rains gorged the grapes. Nonetheless, until early September, everything was still in reasonably good condition except for small pockets where hail had destroyed the vines. The most dramatic changes came late in the season as winemakers were preparing their cellars for the vintage: heavy rains and warm temperatures suddenly confronted almost all regions with fast spreading mould. Some winemakers waited for better conditions;

others, fearing the worst, brought in what they could. What followed was one of the fastest harvests ever - and one of the smallest, at least for those winemakers who selected carefully. They were rewarded with excellent musts, but at the price of extremely low yields. The total crop is estimated at slightly above 9 million hectolitres, which is slightly below last year's harvest and five percent below the long term average, but more than ten percent below the predictions made in early September. Baden and Württemberg were the hardest hit.

The finest wines, both red and white, should be very good, with the northern parts of the country - Mosel, Nahe and Rheingau - faring better than their southern colleagues. In particular, the Mittelrhein was unaffected by the adverse conditions. Crops levels there were up by half compared to last year and some estates are already speaking of an exceptional vintage. Physiological ripeness paired with high acidity will guarantee some excellent bottles. For the basic segment, however, which will be fraught with problems, demand may well exceed supply. The sector most heavily affected by this freak of nature will be the mid-price wines, which at many estates were not produced. It was an all or nothing vintage. ■

After a rather cool spring and a pleasant summer, the grapes ripened slowly but steadily in Eastern Macedonia, Thrakia, Drama, Mount Athos and Chalkidiki. When the rains hit in mid September, most of the harvest had already been brought in, so that 2006 there is considered excellent. In Central and Western Macedonia as well as Thessalia, late ripening varieties like Xinomavro experienced difficulties. Good results were possible only through careful selection and low yields.

A wave of heat followed by heavy rain showers made it difficult for varieties like Cabernet Sauvignon to ripen properly in Epirus and Central Greece. The vines produced good results only when yields were minimized during the summer. The white varieties on the Peloponnes were harvested prior to the heavy rains and show good ripeness with well-balanced acidity. For the reds, the results in the hills were generally better than in the plains which suffered severely from heavy rains. In Santorini and Rhodos, as well, low yields were the key to a good vintage. Lots of sun and moderate temperatures in Crete insured that grapes like Mandilaria had one of its best vintages of the last ten years. ■

1 Germany 2006

Volume in hectolitres

Region	Volume	Change 2005/2006
Ahr	44,000	14.0%
Baden	1,160,000	-12.0%
Franken	473,000	5.5%
Hessische Bergstrasse	30,000	0.3%
Mittelrhein	35,000	45.0%
Mosel-Saar-Ruwer	855,000	-1.0%
Nahe	310,000	0.5%
Rheingau	240,000	20.0%
Rheinessen	2,640,000	8.0%
Pfalz	2,155,000	-2.5%
Württemberg	1,070,000	-10.5%
Sachsen	20,000	8.0%
Saale-Unstrut	46,000	51.0%
<b>Total</b>	<b>9,078,000</b>	<b>-0.4%</b>

Estimate October 2006

SOURCE: DEUTSCHER WEINBAUVERBAND, BONN

## GREECE: MIXED EMOTIONS

by Alex Sakkas

While some Greek regions are full of praise for the 2006 vintage, others complain about low yields and unripe grapes. Nonetheless, as late as early September authorities were expecting a harvest of 4.2 million hectolitres; this would be some ten percent above the long term average. With exports sputtering, lower yields would have been a blessing.

## HUNGARY: LOW YIELDS BUT...

by Mario Scheuermann  
and Norbert Bodorkos

Hungary reports a 2006 crop of approximate 3.5 million hectolitre, 33 percent below the volume of 2005, when 5.2 million hectolitres were crushed. Still, the volume is slightly higher than in 2000 or 2003. Because of the low yields, analysts expect prices to rise, some by as much as 30 to 50 percent, which will effectively choke exports.

As far as quality is concerned, opinions vary widely. Although the volume of botrytized grapes from the production of Aszu was still small in November, the vintage in Tokaj is said to be good to very good. In Balaton as well as in western Hungary maturity was two weeks behind average, but good weather conditions prolonged the ripening period and made late harvests possible. The result, though, was heterogeneous. Riesling suffered severely, with barely 40 percent of an average vintage recorded in volume. Sauvignon Blanc, on the other hand, managed 45 hectolitres per hectare. Often, though, low acidity was the price to pay for sufficient ripeness. L glı Ott  in Balaton-Bogl r, however, is quite happy with the vintage.

The situation in Eger is even better. Demeter Csaba considers 2006 the best vintage of the past ten years. In the south, in the red wine area of Villany, producers are also bubbling with excitement. After a long, cool spring came a phase of rain, followed by extreme heat in July, an unstable August and a warm autumn. While parts of the harvest were destroyed by early hail, further yield reduction was done manually. Winemakers Bock J s zsef and Gere Atill  see the vintage at or above the 2003 level, with higher must weights for Merlot and Cabernet Sauvignon and better acidity. After the recent success of wines like Geres Kop r and Solus at international tastings, even better wines may follow. ■

## ITALY: PROMISING HARVEST

by Mich le Shah

U ntil spring, the weather was generally colder than usual with some ice and snowfalls in north and central Italy. A hot June and July followed with almost no rain, while

August was cooler and rainier than usual. Warm sunny days and cool nights fostered a good ripening season in September and October. While the early ripening grapes, such as Chardonnay, Pinot Grigio and Sauvignon Blanc, were harvested between 14 August and 1 September, the greater part of the grapes were harvested between 15 September and 25 October, with some of the later ripening grapes, such as Nebbiolo, Aglianico and Nerello Mascalese being harvested in November.

In many regions from north to south, producers are claiming an excellent vintage. According to Roberto Felluga in Friuli, 2006 is „a five star vintage. The best in the last 10 years.“ Mattia Vezzola of Bellavista in Franciacorta is equally happy: „Excellent healthy grapes, ripe and ample aromas, which promise elegant wines“ he says.

According to the official Assoenologi report, Italy's 2006 harvest will reach a total quantity of 49.2 million hectolitres. This is down 2.5% on the last harvest, but

### 2 Italy 2006

Volume in thousand hectolitres		
Region	Change to 2005	Volume
Piedmont	+10%	3,360,000
Lombardy	0%	1,100,000
Trentino-Alto Adige	+10%	1,160,000
Veneto	0%	7,090,000
Friuli	-10%	1,040,000
Emilia Romagna	0%	6,620,000
Tuscany	+5%	2,920,000
Marches	-10%	1,090,000
Lazio	+5%	2,490,000
Abruzzo	-10%	3,120,000
Campania	+10%	2,010,000
Puglia	-10%	7,520,000
Sicily	-10%	6,550,000
Sardinia	-10%	830,000
Others	0%	2,300,000
<b>Total</b>	<b>-2.5%</b>	<b>49,200,000</b>

SOURCE: ASSOCIAZIONE ENOLOGI ENOTECNICI ITALIANI

is in line with the average of the past three years. According to Giuseppe Martelli, managing Director of Assenologi, 2006 is one of the best vintages seen by centre and north Italy over the past five years, with very good to excellent results. The south should also be good thanks to regular and even climatic conditions.

„One of the best years in the last 20 years for all Chianti Classico,“ said Marco Pallanti of Castello di Ama. Both the classic areas of Montepulciano and Montalcino express great satisfaction with the quality of the Sangiovese, showing balance, structure and ripeness with good acidity levels. According to top Campania producer, Piero Mastroberardino, „whites are characterized by fresh aromas and good acidity, showing higher quality than the previous 2005 vintage.“ While reds are reported by Alessio Planeta to be well-extracted, in particular Syrah and Nero d'Avola.

Over the past 15 years, Italy's total vineyard area has decreased by 178,000 hectares, equal to the total of Sicily and Piedmont combined. While Italy produces 17% of world's wines, its national consumption continues to decrease, down to 49 litres per capita in 2006, against the 100 litres per capita registered in the 1970's. For the first six months of this year Italy's exports have grown by 12% in volume and 7% in value, while wholesale prices have fallen by an average of 5.5%, reflecting the pressure on the market. During the first six months 50% of Italy's wine exports were to the US, which registered an increase of 16% in value and 10% in volume. ■

## LUXEMBURG: SHORT HARVEST

By Abi Dühr

**A**lthough Mathis Bastian of the eponymous estate in Remich is quite satisfied with 2006, he affirms that this harvest was less evident than usual. Speaking for the

country as a whole, he states that „the weather conditions were perfect during most of the year: the humidity in May favoured the development of the vines, but unfortunately also disease. While dry weather in the second half of June and July arrested that pressure, rain-falls in August permitted excellent mineral structure in the wines“. Quite enthusiastic about his Auxerrois, Pinot Blanc, Pinot Gris and Gewürztraminer, he regrets having harvested his Riesling a little too early. The acidities appear a bit harsher across the board than in 2005 in spite of the fact that the analytical levels are generally a little bit lower. This is especially true for Riesling, which was harvested about 2 weeks earlier than usual and without achieving complete ripeness. With a total crop of 125,000 hectolitres, compared to 135,000 in 2005, the producers of the Grand Duchy harvested 20,000 hl less than on average over the last ten years. ■

## PORTUGAL: DIFFICULT

by Luis Antunes

**A**fter a precocious spring, The 2006 harvest in Portugal began in early August with white grapes in the south, the torrid Alentejo and parts of Algarve. In early September a heat wave crossed the country, causing dehydration and even maturation blockage. During September, milder weather permitted the harvest of better balanced grapes, especially in the southern and central areas - and for early varieties such as Merlot, Syrah, Tinta Roriz, Pinot Noir and Alvarinho. After September 22, rains arrived and with them dilution and rot. Vinhos Verde was nonetheless successful, especially with Alvarinho; in Dão the whites are considered good as are the red varieties Alfrocheiro, Jaen and Touriga Nacional; Palmela enjoyed a very fine vintage, both in terms of quantity and quality; and Madeira enjoyed great weather during the whole of the season.

In Bairrada the whites will also be good, but not the reds. In the southern regions of Ribatejo, Estremadura and Alentejo the call is tougher: only those well tended vineyards were able to endure the difficult weather conditions and bear a chance of producing good wines. For the Douro, 2006 is a vintage of extreme diversity, just like the region, which spans over 45,000 hectares. There were wines harvested before and after the heat wave, before and after the rains, from vineyards at 100 or 650 metres of altitude. Although it is difficult to generalize, many grapes were low on acids but high on sugars, making for somewhat unbalanced wines.

With a total harvest of 6.9 million hectolitres, Portugal harvested four per cent less than last year, which was spot on the long term average. In terms of volume, the Douro and Ribatejo were down 11%, Estremadura down 13% and Bairrada 14%. On the other hand, the producers in the Alentejo brought in 830,000 hectolitres, 20 percent more than in 2005. ■

## SLOVENIA: GOOD TO EXCELLENT

by Robert Gorjak

**T**hings did not start well for the Slovenian vintners in the spring of 2006. It was cool and damp all over the country - and vegetation two weeks late. June and July were hot and dry. In less well managed vineyards vines showed little vigour. August brought another surprise, with unusually low temperature and high rainfall. September, though, was perfectly warm and dry.

Harvest began rather early in the two first weeks of September in Primorska and somewhat latter in Podravje. As sugar levels in grapes then rose dramatically, the window for the picking was quite narrow. In Primorska first reports speak of fresh and elegant whites, with the reds being high in sugar and tannins but

showing balanced acidity. In Podravje, where more than 95% of the wines are white, growers expect a classic vintage with varietal appeal and serious complexity, especially for Riesling. With a total harvest of 762 thousand hectolitres, Slovenia fell 20 percent short of its long term average. While quantity in Podravje it is just slightly below average, it is down about 30% in Primorska. ■

## SPAIN: COMPLICATED

by Victor de la Serna

The year 2006 was again a complicated, uneven year in many parts of Spain, where every vintage since 2001 has had its technical difficulties; this time, it was mainly an unprecedented, ill-timed heat wave in the last week in August and the first in September, which caused a

### 3 Spain 2006

Volume in thousand hectolitres

Region	Estimated 2006	Change
Galicia	1,650	12%
Basque Land	660	7%
Navarra	900	0%
Rioja	2,100	5%
Aragona	1,350	4%
Catalonia	2,950	9%
Castilla y Leon	1,850	10%
Madrid	270	0%
La Mancha	19,950	0%
Valencia	2,600	0%
Murcia	600	0%
Extremadura	2,850	-10%
Andalusia	1,350	15%
<b>Total</b>	<b>40,000</b>	<b>0%</b>

including Asturias, Cantabria, the Balears and Canary Islands

SOURCE: LA SEMANA VITIVINICOLA KA-MA-KASTILLIEN LA MANCHA

sudden shrivelling of berries in southern and eastern Spain and cut production in areas which pick early – including the white wine producing zones of Galicia and Rueda and most of the Mediterranean regions. Later in September there were unusual seasonal rains, which actually helped western regions such as Ribera del Duero, Toro, Bierzo and even Rioja improve their outlook – and quality in these regions, which pick mostly in October, was good to very good.

The total harvest, estimated at 42 million hectolitres, was larger than in 2005, but on line with the long term average, and no region had any catastrophic problems. For the sparkling wine industry it was propitious that Catalonia had a good harvest, so that the producers of cava can meet their export demands. Both Rioja and Ribera del Duero also had slightly larger crops, with the latter posting a new record, some 25% above last year's harvest. In terms of quality, some great wines – but certainly not many – will be produced in Spain in 2006. ■

## SWITZERLAND: ADVANTAGE VALAIS

by Othmar Stäheli

It was an excellent vintage in Valais, Tessin and all other regions profiting from the warm southerly winds in Switzerland. Other appellations, especially those around the big lakes, suffered severely from the wet August. Low yields were the result. Swiss winegrowers thus harvested only around one million hectolitres, well below average. Quality was also very uneven.

Chasselas in western Switzerland and Mueller-Thurgau in the Deutschschweiz were hard hit by the rains. Valais, on the other hand, Switzerland's largest region with 5,200 hectares of vineyard, reports average volume but exceptional qualities. Despite the fact that the upper Rhône valley was hit by heavy rains in August, the vines were

able to recover during the warm, dry weather that persisted until the beginning of November. Similarly Tessin's most important grape variety, Merlot, reached immaculate ripeness under perfect weather conditions. The vintage was less inspiring in the rest of western Switzerland, north and west of Lake Geneva. Gutedel was the grape most heavily affected there. Most white wines from this vintage will be fresh, but they lack structure. ■

### 4 Europe 2006

Volume in thousand hectolitres

Country	5-year average	2006
Albania	103	100
Austria	2,537	2,420
Bosnia	75	72
Bulgaria	1,300	1,500
Croatia	2,000	1,800
Cyprus	351	214
Czech Republic	507	550
France	53,394	55,601
Germany	9,300	10,063
Greece	3,740	4,200
Hungary	4,204	3,604
Italy	51,098	52,602
Luxembourg	141	145
Macedonia	1,400	1,350
Malta	68	70
Montenegro	650	635
Portugal	7,292	6,900
Romania	6,500	6,700
Serbia	2,050	1,970
Slovakia	432	400
Slovenia	952	762
Spain	42,206	42,475
others	18	20
<b>Total</b>	<b>190,318</b>	<b>194,153</b>

SOURCE: DEUTSCHER WEINBAUVERBAND, BONN