

V I N T A G E 2 0 2 2

EXECUTIVE REPORT



Vinos de Chile®
Wines of Chile

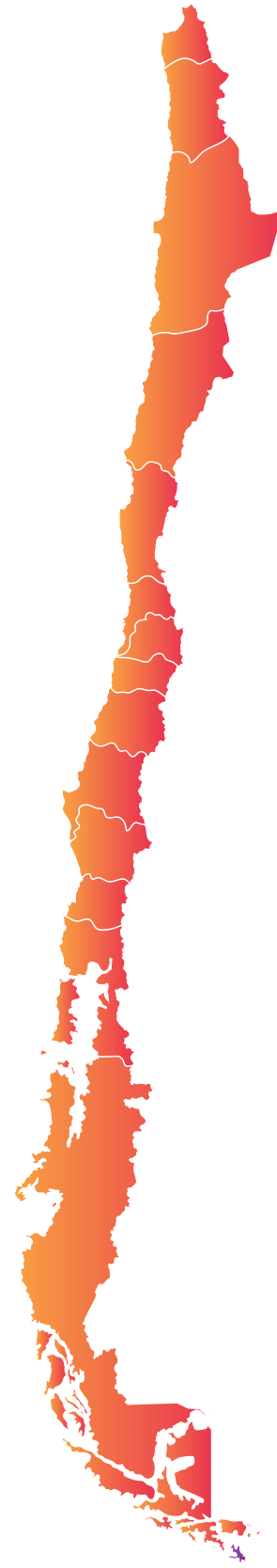


Asociación Nacional
de Ingenieros Agrónomos
Enólogos de Chile

C H I L E

WINE CHILE

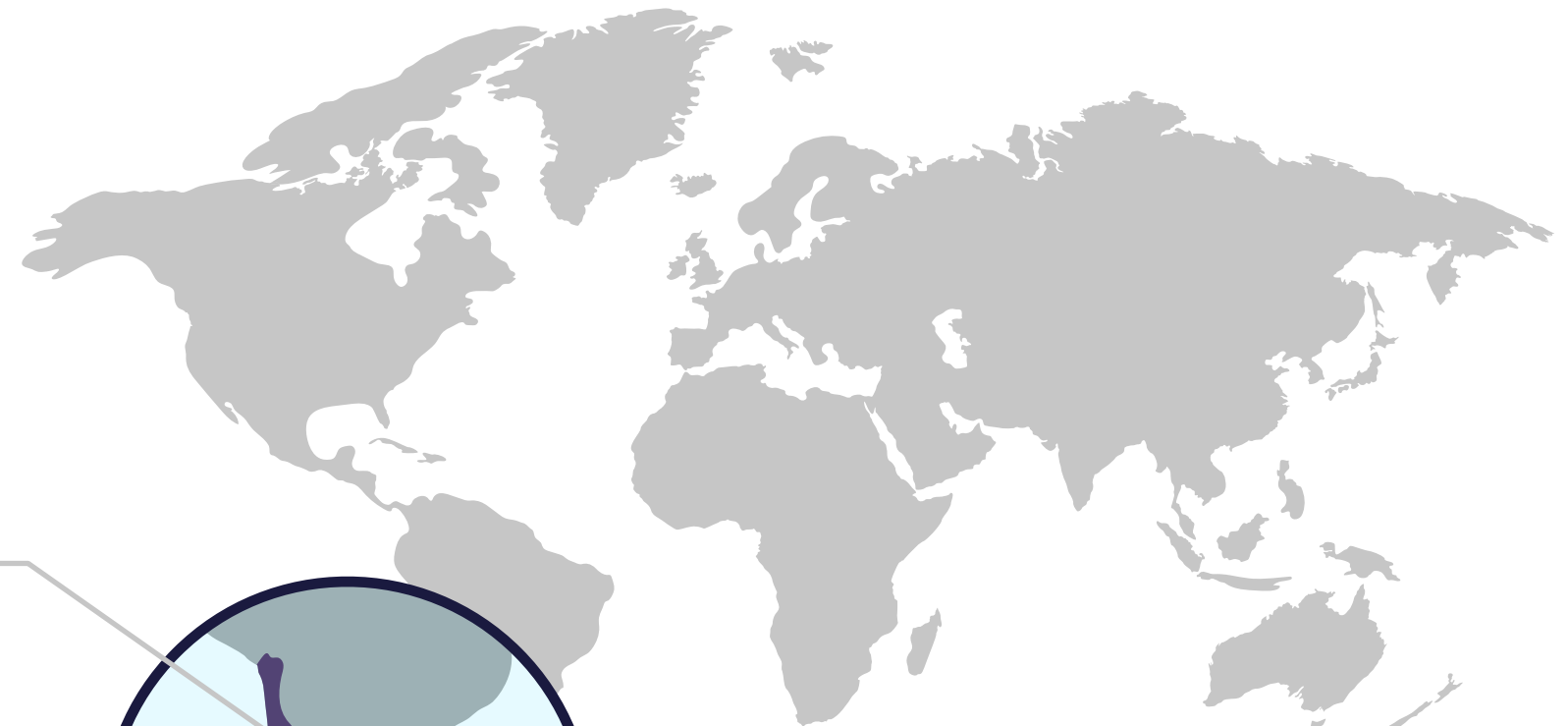
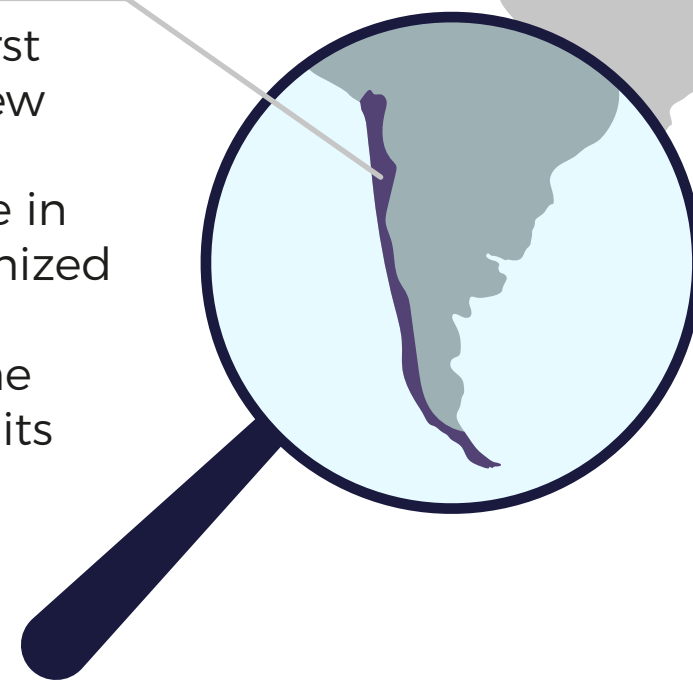
VINTAGE 2022



SOUTH AMERICA

CHILE

Chile is currently the first wine exporter in the new world and the fourth largest exporter of wine in the world, being recognized for its geographical richness, reflected in the quality and diversity of its grape varieties.



VINTAGE 2022



VINTAGE REPORT 2022

Executive Summary

GENERAL BACKGROUND

Sampling Universe

The results of the survey represent 262 million liters produced in 2022, corresponding to 20.3% of Chilean wine production in 2021, and 23.1% of wines with D.O. at the national level (SAG 2022).

Participation of 100 wine companies.

The harvest survey was divided into:

1. Grape Growers Survey _____ 70 surveys.
2. Wine Producers Survey _____ 65 surveys.

N° Surveys by winegrowing region:
GRAPE GROWERS

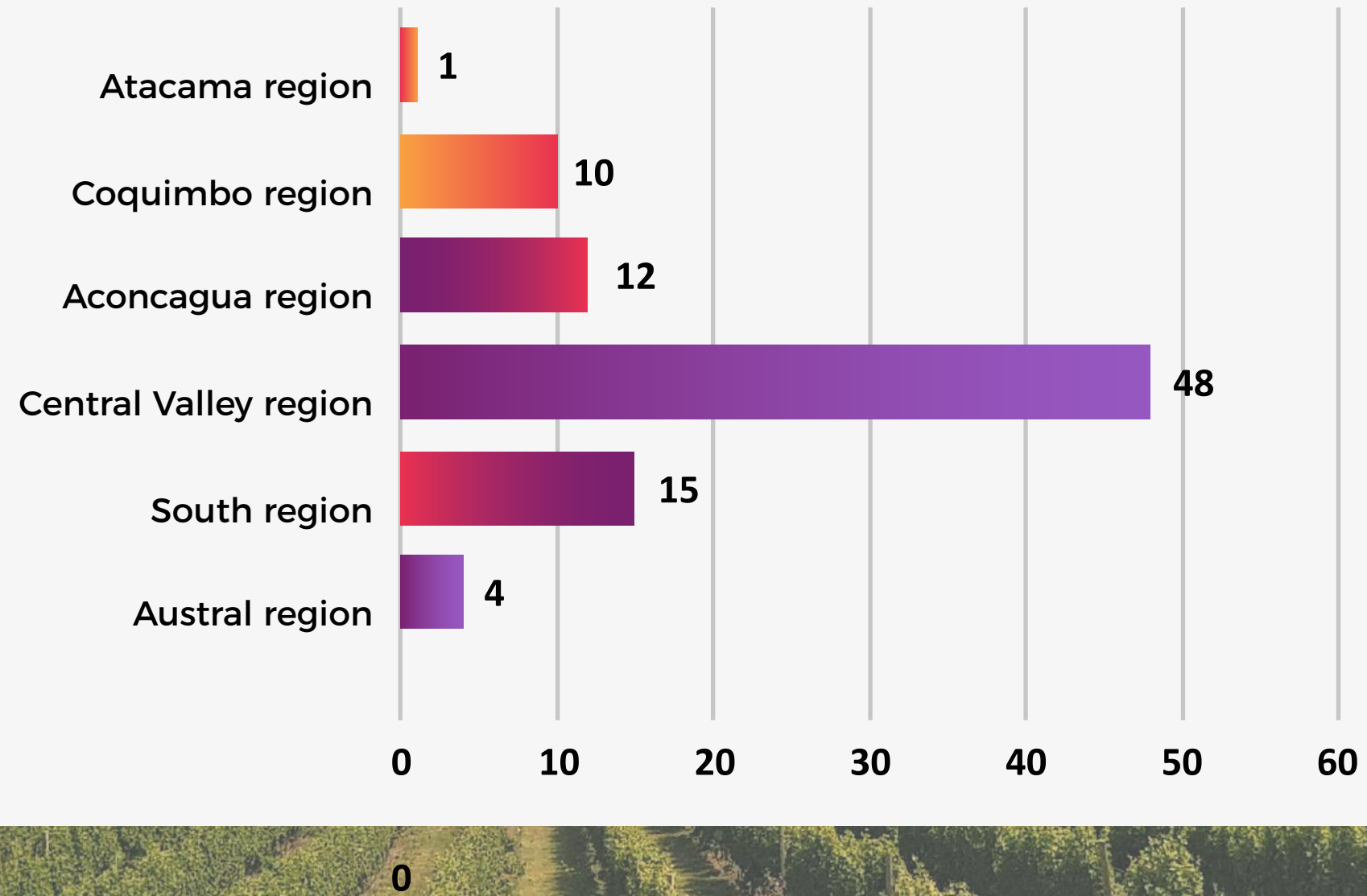


Figure 1.
Number of surveys by winegrowing region.
Grape Growers Survey, 2022.
Surveys may represent more than one winegrowing region or valley.

N° Surveys by winegrowing region:
WINE PRODUCERS

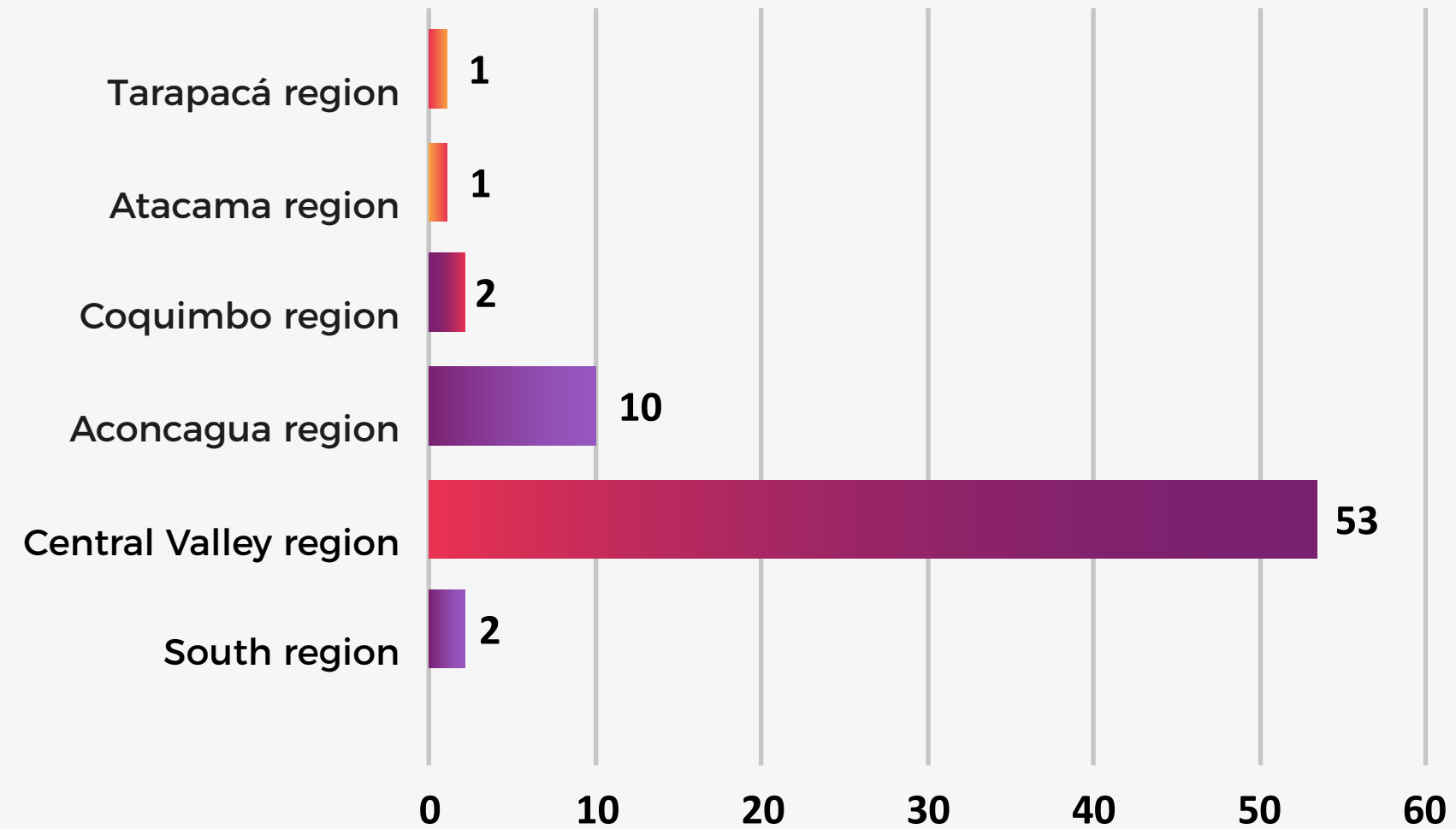


Figure 2.
Number of surveys by winegrowing region.
Wine Producers Survey, 2022.
Surveys may represent more than one winegrowing region or valley.



KEY ASPECTS OF THE SEASON

VINTAGE
CHILE

2022

VINTAGE 2022



Harvest 2022 Chile

CLIMATOLOGICAL ASPECTS

Water availability



DAMS

In December 2021 the dams accumulated 5,705 million m³ of water, reaching a national deficit of -21.5% in relation to the national historical volume (7,270 million m³).



ACCUMULATED RAINFALL

In terms of accumulated rainfall, the 2021-2022 season presented a greater deficit than the 2020-2021 season. 46% of grape growers reported insufficient precipitation during the winter.



VINEYARDS

Considering rainfed vineyards, 32% of the producers stated that they had not accumulated enough water in the soil during the season.

Between October and March, rainfall reached 34 mm in Maule, 64 mm in Itata and up to 136 mm in Traiguén,



CLIMATOLOGICAL ASPECTS

Winter Rainfall

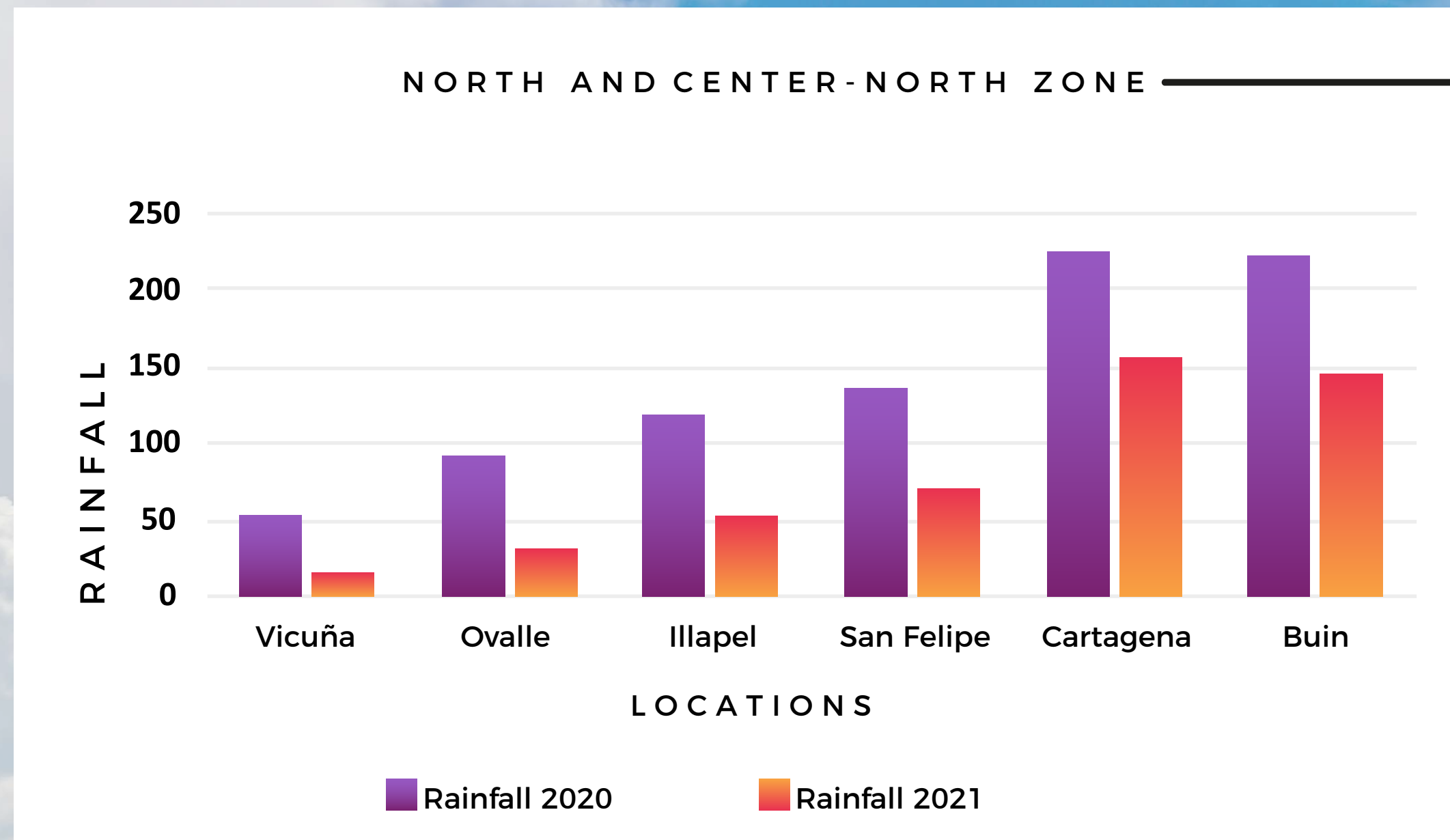


Figure 3.
Rainfall in valleys of the northern and north-central zone (mm) 2020 and 2021 seasons.
Source: ODEPA Pre-harvest Report, 2022.

CLIMATOLOGICAL ASPECTS

Winter Rainfall

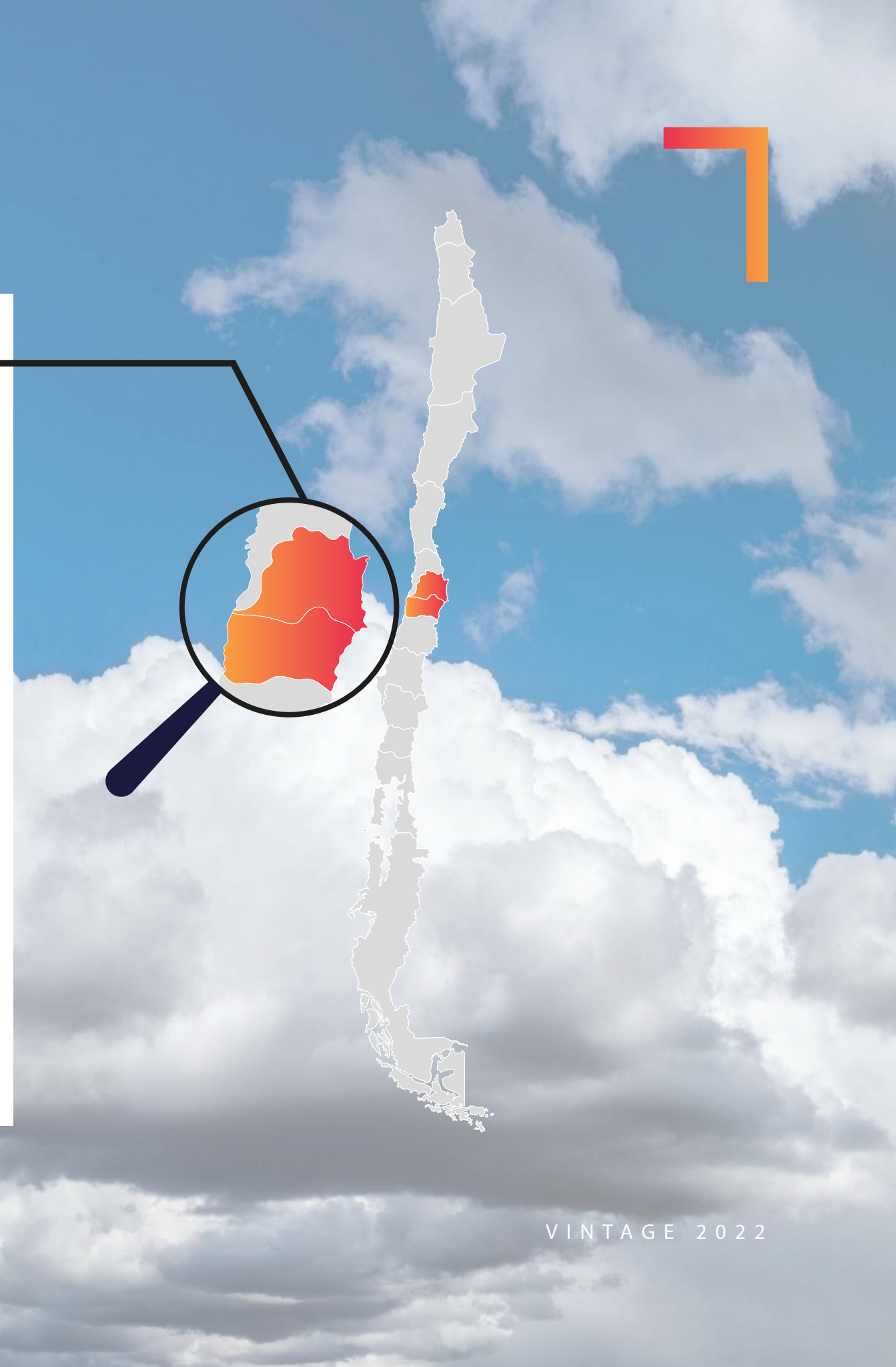
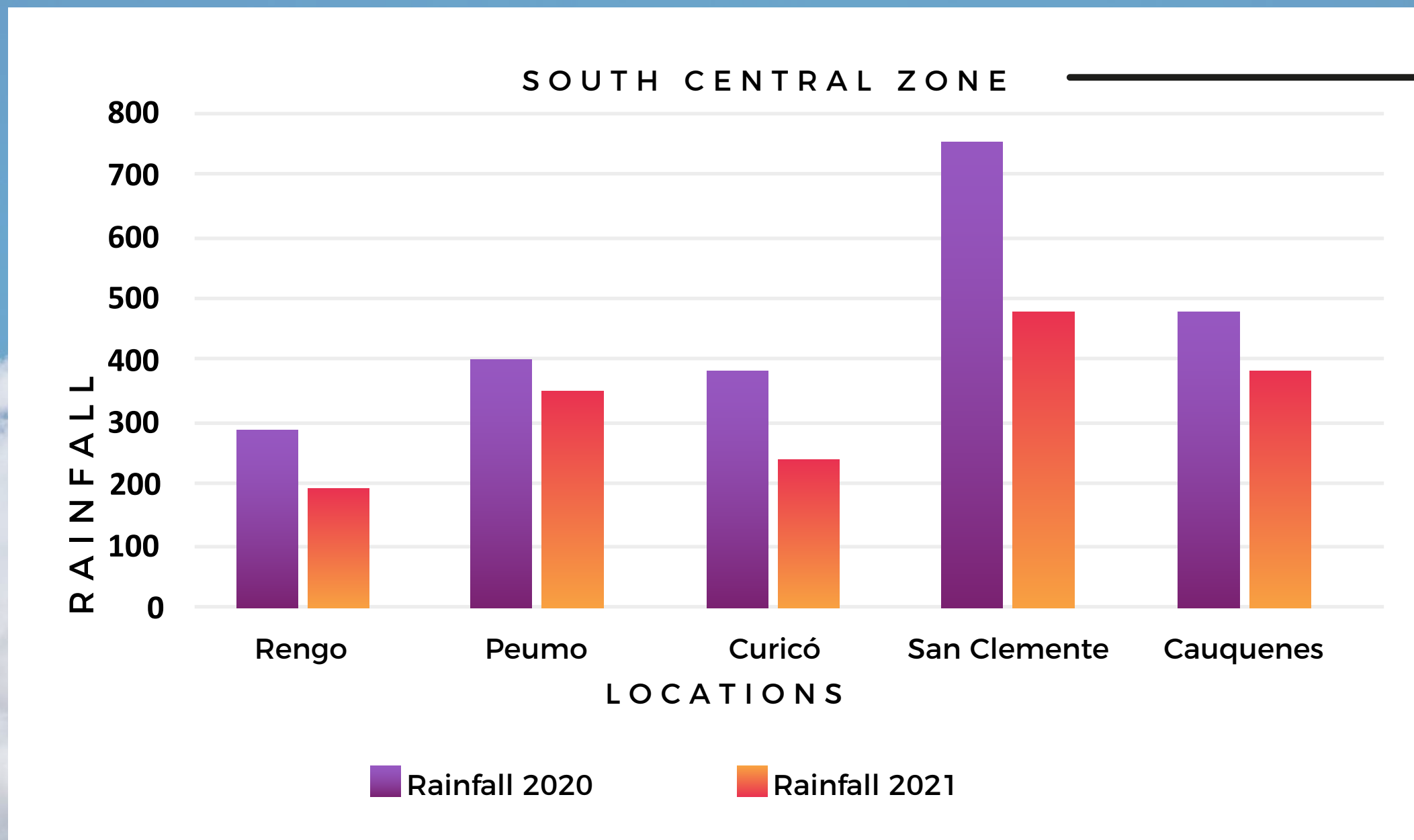


Figure 4.
Rainfall in valleys of the central-south zone (mm). 2020 and 2021 seasons.
Source: ODEPA Pre-harvest Report, 2022.



TEMPERATURES

·In summer, **heat waves** occurred at the end of December 2021 in the central zone and during the month of January 2022 between Atacama and Ñuble.

·From La Serena to Curicó and the insular **ZONE**, the average temperatures for the 2021-2022 season were lower than in 2020-2021.

·The season was characterized by a **low incidence of frost**, concentrated in late winter. Only 3% of grape growers reported frost damage due to these events.

CLIMATE TABLES

By viticultural zone

Table 1.
Agrometeorological parameters Northern Zone, October 2021- March 2022 season.
Source: Agrometeorology INIA, 2022.

Norte / Aconcagua	Locality	Average maximum T°	Average T°	Rainfall Accumulated (mm)	Accumulated degree-days (base 10°C)
Atacama	CE Huasco, Vallenar	18,2	18,2	2,5	1299,2
	El Tololo, Vicuña	18,8	15,5	0,4	1009,9
Coquimbo	Parque Los Pimientos, Vicuña	28,1	19,3	0,4	1692,7
	Chaguaral, Monte Patria	28,2	19,9	0,0	1799,7
	Illapel, Illapel	25,8	17,3	0,0	1330,1
Aconcagua	Cuncumén, San Antonio	24,5	15,9	4,3	949,3
	Escuela Agrícola, San Felipe	30,0	20,0	0,9	1814,4
	Lo Zarate, Cartagena	19,4	14,5	1,8	949,3

Table 2.
Agrometeorological parameters Central Zone, October 2021- March 2022 season.
Source: Agrometeorology INIA, 2022.

Valle Central	Locality	Average maximum T°	Average T°	Rainfall Accumulated (mm)	Accumulated degree-days (base 10°C)
Valle del Maipo	El Paico, Talagante	26,3	18,0	4,0	1448,9
	La Platina, La Pintana	28,5	19,1	7,9	1646,8
Valle del Cachapoal	El Tambo, San Vicente	28,4	19,4	7,2	1710,7
	Liceo Jean Buchanan, Peumo	29,2	19,5	8,7	1713,1
	Rayentué, Rengo	27,5	18,2	9,0	1491,5
Valle de Colchagua	Nilahue - Pumanque (Lolol)	25,2	19,6	7,1	1254,2
	Peor es Nada, Chimbarongo	26,5	17,2	7,7	1318,5



CLIMATE TABLES

By viticultural zone

Table 3.
Agrometeorological parameters of the South-Central Zone, October 2021- March 2022 season.
Source: Agrometeorology INIA, 2022.

Valle Central	Locality	Average maximum T°	Average T°	Rainfall Accumulated (mm)	Accumulated degree-days (base 10°C)
Valle de Curicó	Rauco, Aeródromo General Freire	26,5	19,0	3,6	1638,7
	San Clemente	27,5	18,4	21,0	1521,3
Valle del Maule	Linares	26,8	17,5	34,1	1363,5
	Cauquenes	28,2	18,5	20,8	1550,5

Table 4.
Agrometeorological parameters Southern Zone, October 2021- March 2022 season.
Source: Agrometeorology INIA, 2022.

Región del sur y Austral	Locality	Average maximum T°	Average T°	Rainfall Accumulated (mm)	Accumulated degree-days (base 10°C)
Itata	Portezuelo	27,3	19	17,3	1630,3
	Puralihue, Coelemu	24,8	15,7	24,2	1035,6
	Santa Rosa, Chillan	26,8	17,1	64,8	1296,2
Bio Bio	La Colonia	26,2	17,7	5	1403,6
Malleco	Traiguén	22,6	15	136	939,4



VINTAGE PROGRESSION

- In the 2021- 2022 season, phenological stages developed within the usual dates for their localities. Budbreak was similar to the previous year.
- Harvest dates differed according to the viticultural zones. In the Huasco, Cachapoal and Itata valleys, there are no differences with respect to the 2021 harvest. In Casablanca valley it was one to two weeks earlier, while in the Aconcagua and Colchagua valleys it was one week earlier.
- The Maipo and Curicó valleys reported a harvest delay of two weeks. The Maule valley was more variable, with areas two weeks early and others up to three weeks late.
- In the Maule drylands, the presence of summer rains favored good grape ripening. On the other hand, in Quillón, and the Itata valley, the rains were deficient, which complicated grape development.
- The harvests were characterized by grapes with good °Brix's accumulation, good acidity, and low pH.



SANITARY CONDITION

- Good sanitary condition of the grapes was the aspect most highlighted by grape growers.
- The presence of diseases was low throughout all the country, being described by only 3% of the producers. 10% of growers reported the presence of pests during the season.
- Stem dehydration was observed in the Cabernet Sauvignon variety in some areas of the central valley.
- 13% of the growers described damage by grape shatter and 10% dehydration in red varieties.



LABOR AVAILABILITY DURING THE SEASON

- For 54% of the winemakers, the most unfavorable aspect of the season was the cost of labor, and 49% indicated having problems with labor availability.

- 66% of the wineries indicated that they had less or very little labor available.

- Higher than 2021
- Lower than 2021
- Much lower than 2021
- Similar

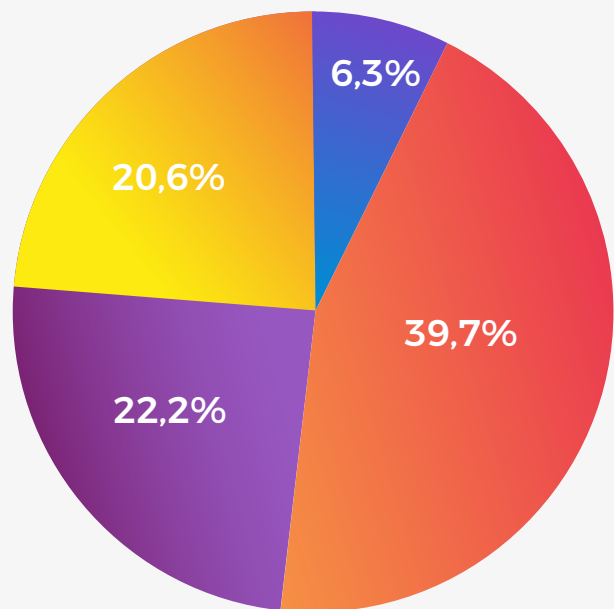


Figure 5.
Availability of workers in wine cellars.
Survey of Wine Producers 2022.

QUALITY OF GRAPES AND WINES



Sauvignon Blanc

Higher quality grapes and wines

Sauvignon Blanc grapes - Overall quality

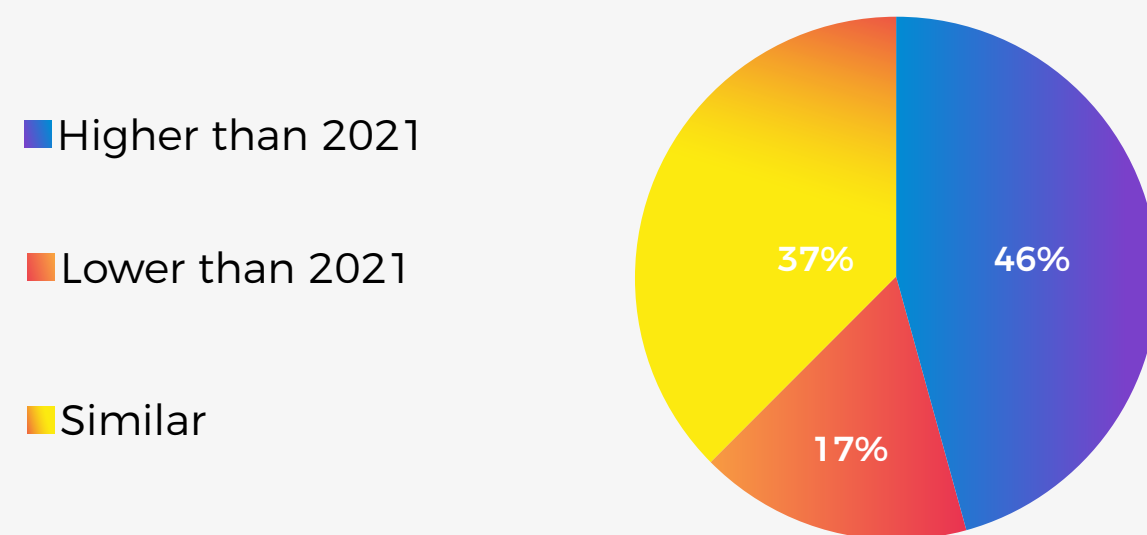


Figure 6.
Overall quality of Sauvignon Blanc grapes in 2022,
compared to the previous season.
Grape Growers Survey 2022.

Sauvignon Blanc wines - Overall quality

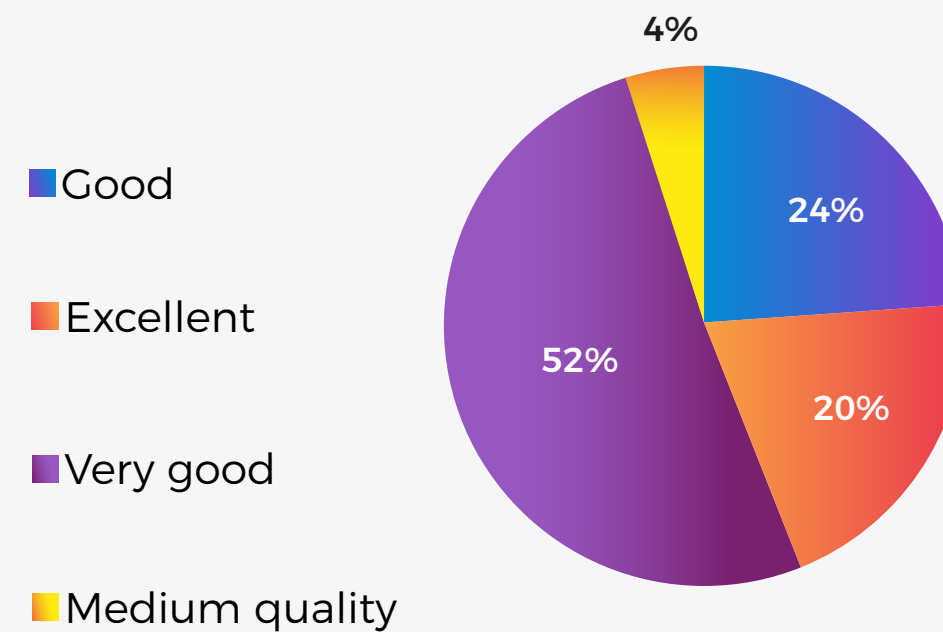


Figure 7.
Overall quality of Sauvignon Blanc wines, year 2022.
Wine Producers Survey 2022.

QUALITY OF GRAPES AND WINES



Chardonnay

Higher quality grapes and wines

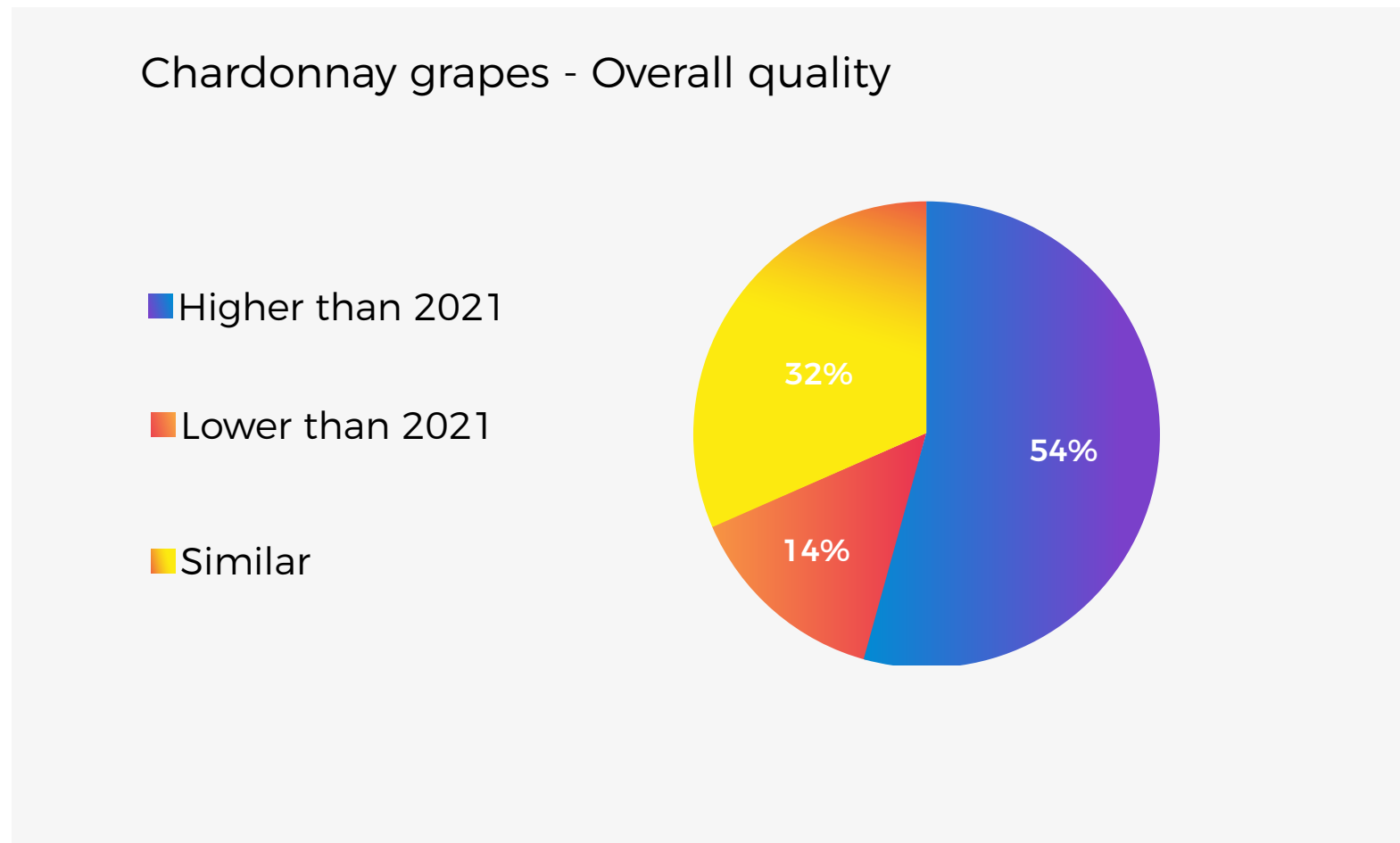


Figure 8.
Overall quality of Chardonnay grapes in 2022,
compared to the previous season.
Survey of Grape Growers in 2022.

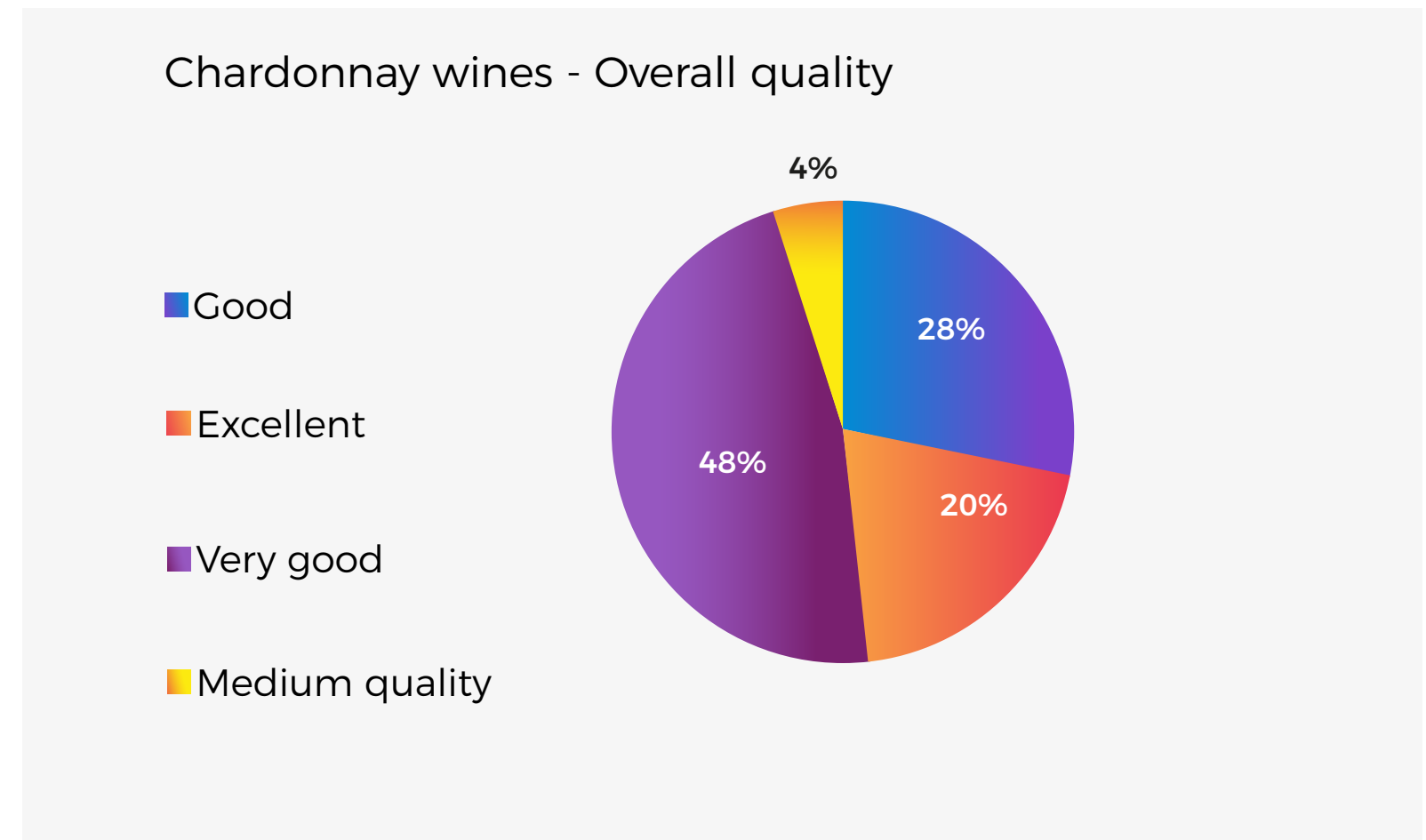


Figure 9.
Overall quality of Chardonnay wines, year 2022.
Wine Producers Survey 2022.

QUALITY OF GRAPES AND WINES

Cabernet Sauvignon

Higher quality grapes and wines



Cabernet Sauvignon Grapes - Overall Quality

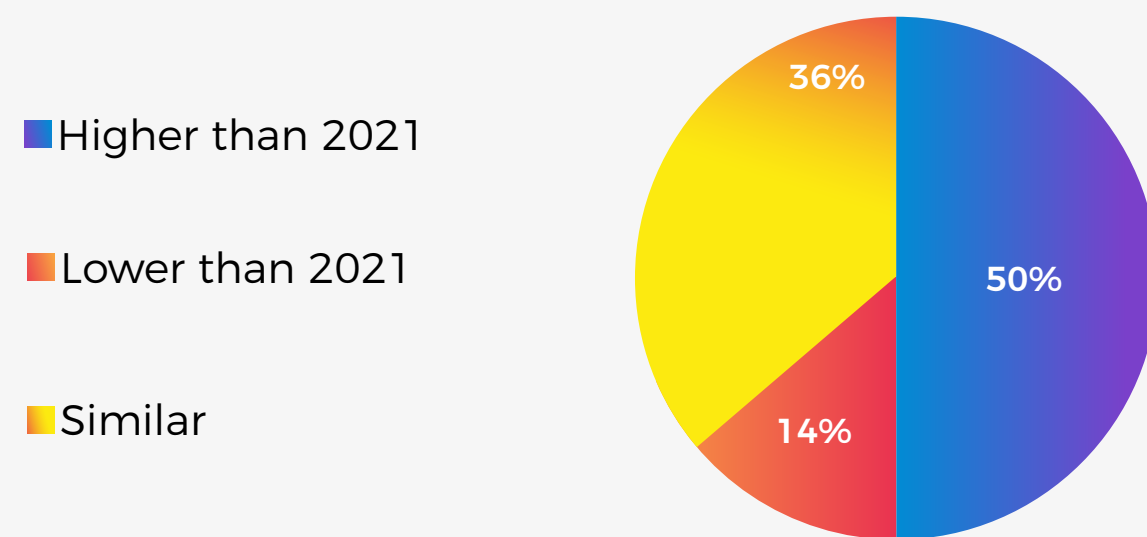


Figure 10.
Overall quality of Cabernet Sauvignon grapes in 2022, compared to the previous season. Survey of Grape Growers in 2022.

Cabernet Sauvignon wines - Overall quality

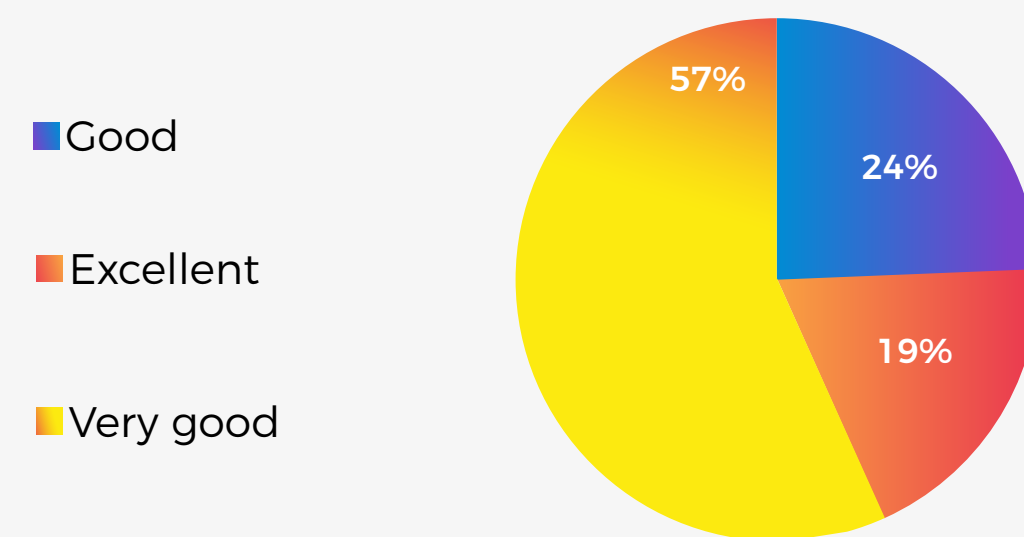


Figure 11.
Overall quality of Cabernet Sauvignon wines, year 2022. Wine Producers Survey 2022.

QUALITY OF GRAPES AND WINES



Carmenere

Higher quality grapes and wines

Carmenere Grapes - Global Quality

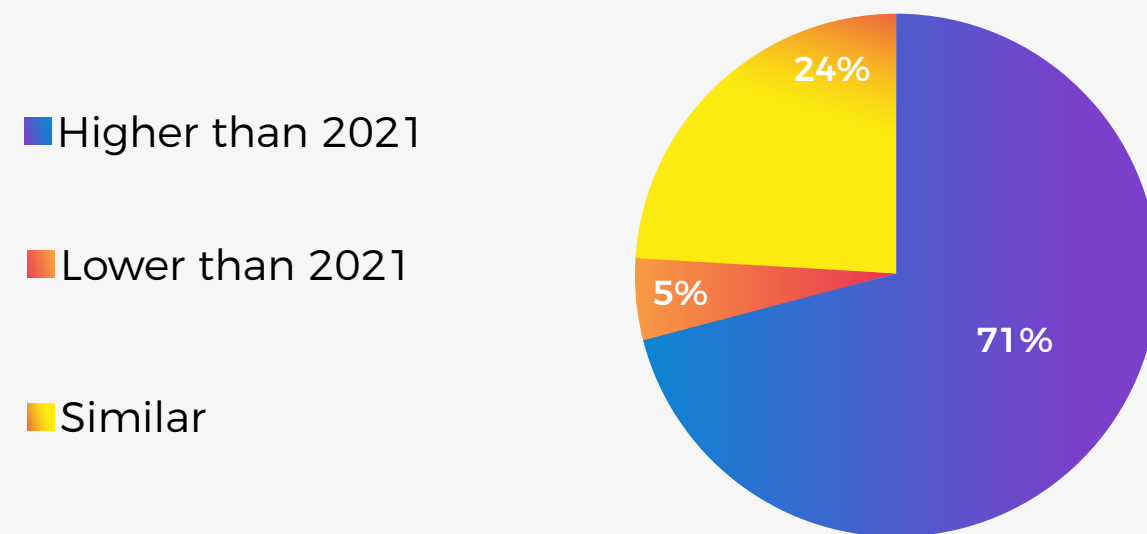


Figure 12.
Overall quality of Carmenere grapes in 2022,
compared to the previous season.
Survey of Grape Growers in 2022.

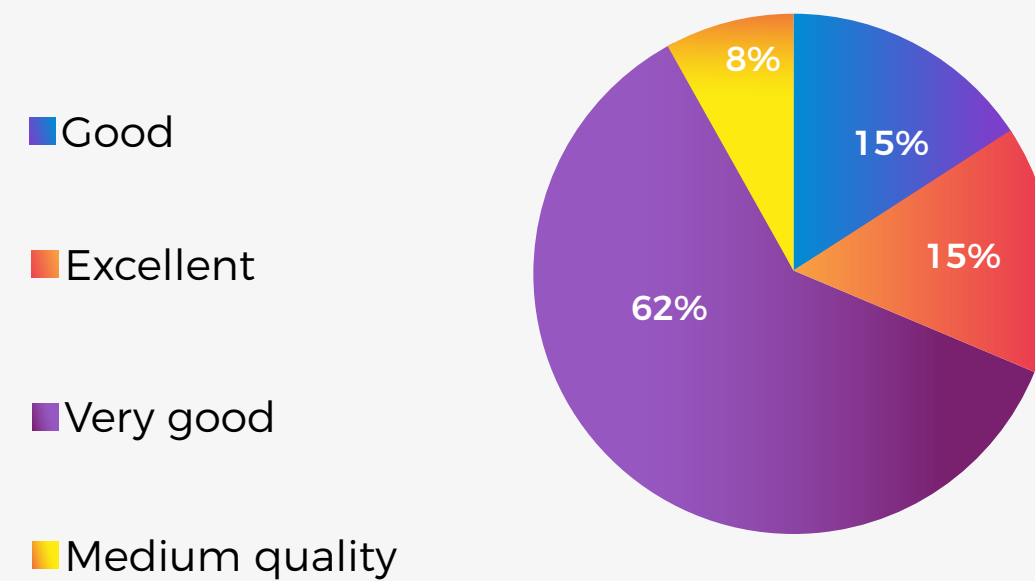
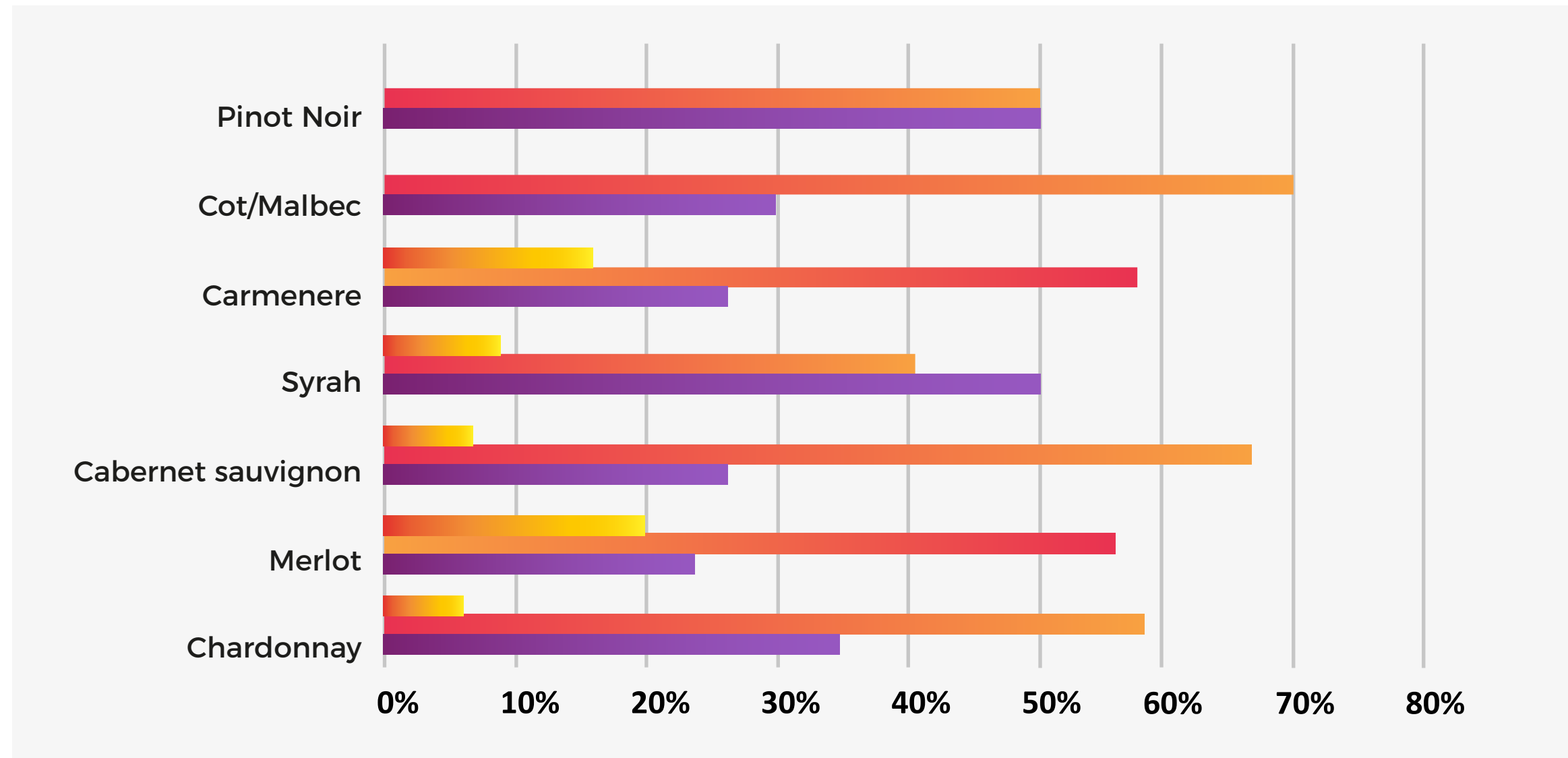


Figure 13.
Overall quality of Cabernet Sauvignon wines year 2022.
Wine Producers Survey

QUALITY OF GRAPES AND WINES

WINE QUALITY AND YIELDS



- Maintained yields
- Decreased yields
- Increased yields

Figure 14.
Yields by grape variety, in relation to the previous season, year 2022.
Grape Growers Survey 2022.

QUALITY OF GRAPES AND WINES

Favorable aspects of the season ✓

- Among the favorable aspects highlighted by the growers, the first is the excellent phytosanitary condition and quality of the grapes, the absence of frost in the spring and the absence of rain during the harvest and flowering.
- Yields were in line with what was expected given the condition of the vineyard since spring.
- The winemakers emphasize the great timeliness of the harvest, the favorable evolution of phenolic maturity in the red varieties, the fresh and aromatic white wines, and the good acidity in all types of wines.



QUALITY OF GRAPES AND WINES







Unfavorable aspects of the season X

- The unfavorable aspects of the season were led by the cost and lack of labor, followed by the availability of water in the vineyard's, with insufficient rainfall in winter and insufficient water in the soil profile in spring, for which the grape growers also pointed out the low vegetative expression of the vineyard.
- For the winegrowers, the labor situation was the most relevant issue. In terms of winemaking, nitrogen availability (YAN) was below average and some clarification problems occurred in white grape juices.



CONCLUSIONS

VINTAGE 2022

-  This vintage is described as successful, with healthy grapes of good quality and timeliness.
-  Due to water shortages and some minor fruit set events, a 5-10% decrease in production is expected.
-  Stem dehydration and grape shatter had an effect on red grapes yields.
-  The shortage and high cost of labor, together with the limited availability of water, were the main problems of the season.
-  The ripening of the grapes in the wine-growing regions was outstanding, with good acidity levels and balanced °Brix's levels in most varieties.
-  The quality of the grapes was higher than in 2021 and the wines stand out for their good quality and potential.



ACKNOWLEDGMENT

Participated in this survey:

- 1.Viñedo y Familia Chadwick
- 2.Corral del Sol
- 3.Barón Philippe de Rothschild
- 4.Agrícola y Comercial Santa Camila
- 5.Viña Don Raúl
- 6.Agrícola Las Petras
- 7.Viñedos Montegrande
- 8.Vitis
- 9.Agrícola Coronel de Maule
- 10.Viña Santa Andrea
- 11.Viña Montgras
- 12.Viñedos Veramonte
- 13.Agrícola Mai
- 14.Frutícola Agua Dulce
- 15.Luis Ortiz Muñoz
- 16.Viña Montes
- 17.Calyptra Vineyards & Winery
- 18.Ventisquero Wine Estates
- 19.Viña Trabun
- 20.Gallo Chile
- 21.Viña Geisse
- 22.Viña San Vicente
- 23.Soc. Agrícola La Cabaña
- 24.Viña Torrealba
- 25.Agrícola Pichimapu
- 26.Agrícola San Sebastián
- 27.Viña Siegel
- 28.Territorios
- 29.Agrícola Flor Negra
- 30.Viña Las Pitras
- 31.Vinos Don Chapín
- 32.Soc. Viña Montt
- 33.Agrícola y Ganadera Litu
- 34.Soc. Inversiones y Servicios Apalta
- 35.Cooperativa Lagar de los Oasis
- 36.Viña Altacima
- 37.Miguel Torres
- 38.Viña Cousiño Macul
- 39.Agrícola Francisco Javier González
- 40.La Aldea
- 41.Viña Salesianos
- 42.Torreón de Paredes
- 43.Viña Alquihue
- 44.Viña El Encanto
- 45.Viña Astaburuaga
- 46.Polkura
- 47.Agrícola Rinconada de Yáquil
- 48.Viñedos Borde Lircay
- 49.Vitícola Los Cerrillos y Cía
- 50.Agrícola RV
- 51.Agrícola San Pedro
- 52.Agrícola Santa Matilde
- 53.Agrícola Iriarte Lozano
- 54.Lagar de Codegua
- 55.Sociedad Agrícola Santa María
- 56.Viña Echeverría
- 57.Raynaud Lacaze
- 58.Comercial Montt
- 59.Viña Concha y Toro
- 60.Viña El Escorial
- 61.Montegrande
- 62.RR Wine
- 63.J.P. Martin
- 64.Viña Casa Romero
- 65.Viña Santa Cruz
- 66.Viña Los Vascos
- 67.Viña Puntí Ferrer
- 68.Valle Secreto
- 69.Viña Cono Sur
- 70.Rockwines
- 71.Viña Morande
- 72.Atypical Wines
- 73.Sauzal Winery
- 74.Tierra y Sangre
- 75.Lugarejo
- 76.Vinícola Patacón
- 77.Lapostolle Wines
- 78.Viña Dalbosco
- 79.Viña Marty
- 80.T. Villard Fine Wines
- 81.Viña Santa Rita
- 82.Viña Undurraga
- 83.Bodega Mariana
- 84.Santa Ema
- 85.Viña Aromo
- 86.Vinos Parry
- 87.Tapihue Wines
- 88.Viña del Pedregal
- 89.San Pedro
- 90.Pino Román
- 91.Q Wines
- 92.Viña Almaviva
- 93.I. Municipalidad de Coelemu
- 94.Correa Albano
- 95.Agrícola Tierras Altas
- 96.P.S. García
- 97.Viña Casa Silva
- 98.Vinos Baettig
- 99.Viña William Fevre Chile
- 100.La Ronciere

