

VINTAGE REPORT 2021

Executive Summary



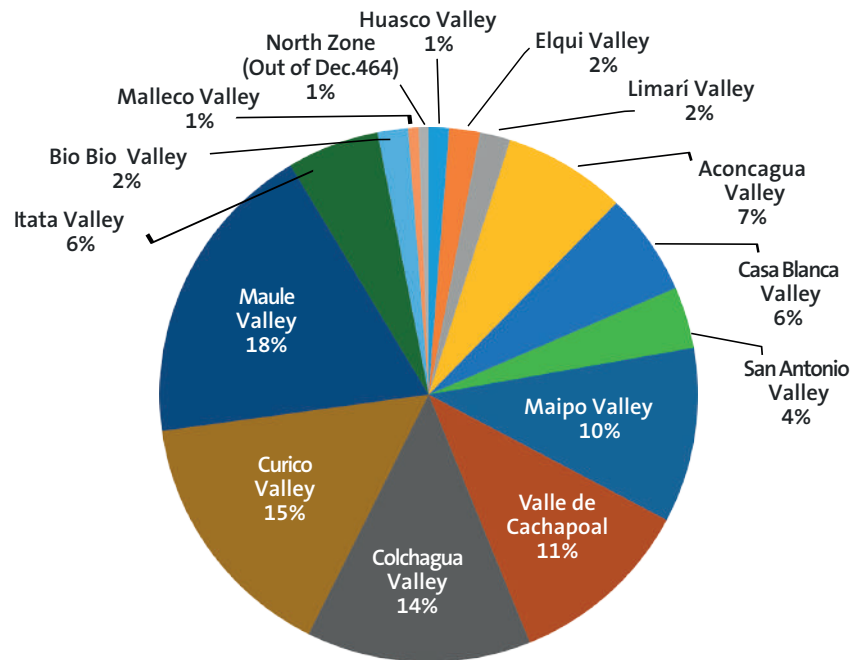
Asociación Nacional
de Ingenieros Agrónomos
Enólogos de Chile

SAMPLING UNIVERSE

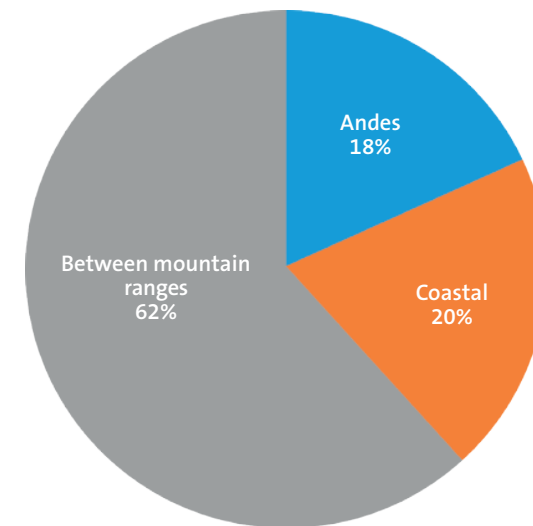
- Survey information was gathered from producers holding 40.712 hectares of vineyards representing 28% of Chile's total vineyard surface*, owned by 87 wineries.

*2019 National Viticultural Cadaster, Servicio Agrícola y Ganadero, SAG (Agricultural and Livestock Bureau)
Total vineyard surface: 145.461 hectares.

**Wineries that answered vintage survey
by Viticultural Valley
(Decree 464)**



**Respondents' geographic area
Vintage report
2020-2021 Season**



KEY ASPECTS OF THE SEASON

WEATHER CHARACTERISTICS



River flow recovery in many areas, as well as reservoir levels. River flow recovery in many areas, as well as reservoir levels.



Greater **soil water** accumulation at the beginning of the spring with higher irrigation water availability.



Important **frosts** in August and beginning of October: certain losses in Chardonnay and Pinot Noir.



Mild Season: lower summer average maximum temperatures without heat waves.



Unexpected summer rains (01/28 until 02/02) from Aconcagua to Osorno: 20 to 110 mm (0.8 to 4.3 in) depending on the area.

KEY ASPECTS OF THE SEASON

VINTAGE PROGRESSION



Higher budburst percentage, evenly across all varieties, on similar dates.



During the following 3 to 4 weeks after the rain, the weather kept cold and cloudy: slow ripening.



Unusual rains in summer with different effects depending on the variety and the area.



Lower evapotranspiration peaks: lower berry dehydration incidence at harvest.



Dry farming vineyard lands, summer rain water was considered beneficial, since vineyards were in need.



Harvest onset: **early** in some varieties to mitigate rain effect. **Late** in others, due to low temperatures during ripening.

KEY ASPECTS OF THE SEASON

SANITARY CONDITIONS



Certain grapes were affected by Botrytis, to varying degrees. The most affected varieties were mainly white, as well as early red thin-skinned reds (Pinot Noir, Syrah).



Sour rot incidence was also reported, to a lesser extent than Botrytis.



Grapevine moth (*Lobesia botrana*) damage more significant than in other seasons.

NUTRITIONAL DISORDER



Post-summer rain: “palo negro” (stalk necrosis) in some red varieties.

KEY ASPECTS OF THE SEASON

OTHER CONSIDERATIONS



Low workforce availability, high priced.



Harvest was made under COVID-19'S restrictions, imposed by the health authority.



Long harvest span, consequence of working with few people in fields and wine cellars.



Given the initial phytosanitary complexity: strategic organization of producers, winegrowers and winemakers to manage the low availability of physical and human resources.



REGION AND SUBREGION DETAIL

Region	Valley	Site	Winter Rainfall (mm) Jun - Jul - Aug	Mean Maximum Temperature (C°)		Spring Frost (days)	Accumulated Degree-Days (C°) Oct-Mar 20-21	Accumulated Degree-Days (C°) Oct-Mar 19-20
				Feb 21	Feb 20			
Atacama	Copiapo Valley	Copiapo	2,1	26,2	26,8	2	1.421	1.605
	Huasco Valley	Huasco	26,1	25,5	25,5	0	1.302	1.428
Coquimbo	Elqui Valley	Vicuña	50,9	28,4	29,8	3	1.561	1.753
	Limari Valley	Ovalle	59,4	26,4	26,5	4	1.236	1.376
	Choapa Valley	Illapel	117,5	26,9	27,9	2	1.300	1.464



REGION AND SUBREGION DETAIL

Region	Valley	Site	Winter Rainfall (mm) Jun - Jul - Aug	Mean Maximum Temperature (C°)		Spring Frost (days)	Accumulated Degree-Days (C°) Oct-Mar 20-21	Accumulated Degree-Days (C°) Oct-Mar 19-20
				Feb 21	Feb 20			
Aconcagua	Aconcagua Valley	San Felipe	128,5	30,4	32,4	14	1.779	1.945
	Casablanca Valley	Casablanca	39,2	23,2	28,1	12	974	1.258
	San Antonio Valley	Leyda	267,6	20,9	24,3	21	939	1.165
Central Valley	Maipo Valley	Pirque	218,0	24,9	28,9	32	952	1.208
		Talagante	215,2	26,4	29,9	5	1.448	1.662



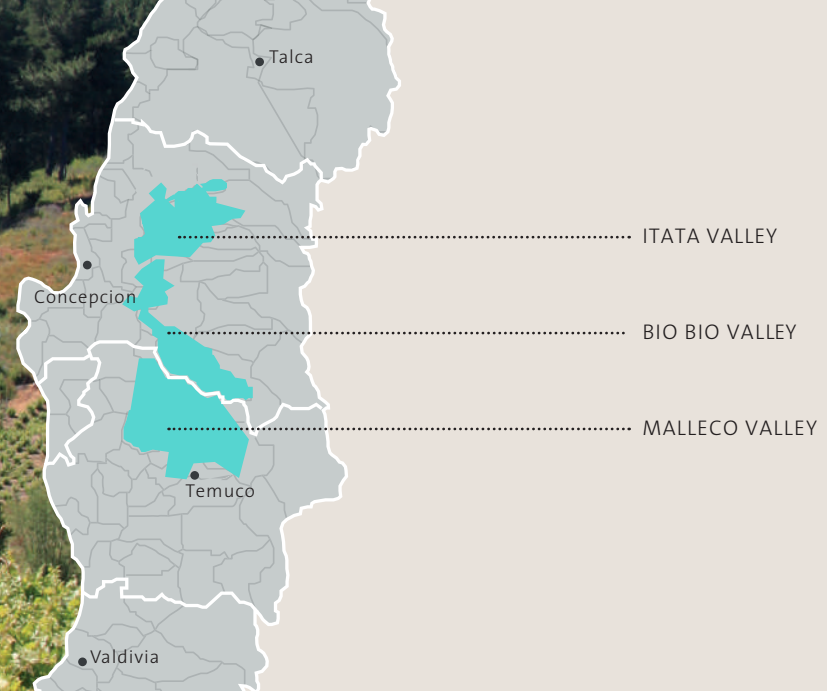
REGION AND SUBREGION DETAIL

Region	Valley	Site	Winter Rainfall (mm) Jun - Jul - Aug	Mean Maximum Temperature (C°)		Spring Frost (days)	Accumulated Degree-Days (C°) Oct-Mar 20-21	Accumulated Degree-Days (C°) Oct-Mar 19-20
				Feb 21	Feb 20			
Central Valley	Cachapoal Valley	Rengo	273,0	26,7	30,8	8	1.504	1.691
		Peumo	376,1	27,5	31,9	2	1.669	1.881
	Colchagua Valley	Los Lingues	359,4	27,2	32,9	10	1.590	1.792
		Placilla	379,8	26,5	31,9	1	1.561	1.793
		Apalta	448,8	26,9	30,8	2	1.574	1.972
Marchigüe	310,8	25,7	30,3	12	1.498	1.756		



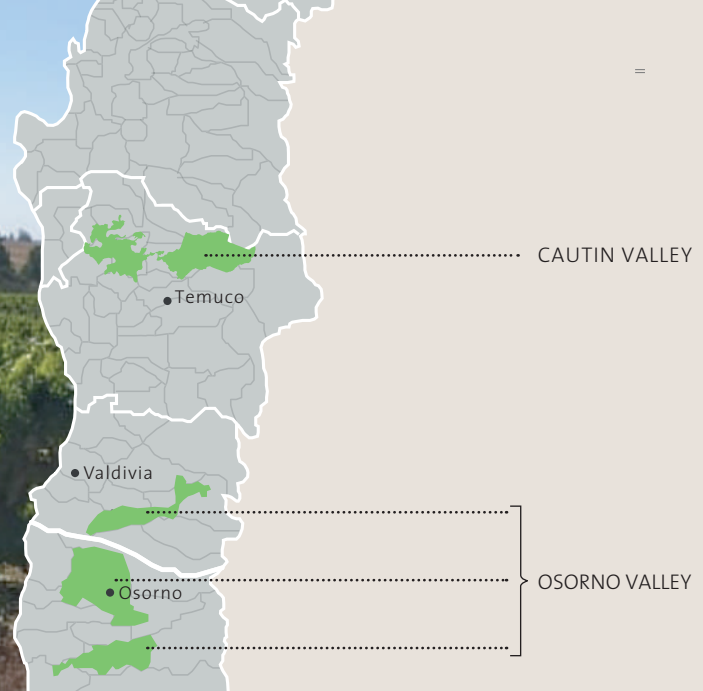
REGION AND SUBREGION DETAIL

Region	Valley	Site	Winter Rainfall (mm) Jun - Jul - Aug	Mean Maximum Temperature (C°)		Spring Frost (days)	Accumulated Degree-Days (C°) Oct-Mar 20-21	Accumulated Degree-Days (C°) Oct-Mar 19-20
				Feb 21	Feb 20			
Central Valley	Curico Valley	Curico	332,4	25,6	30,1	3	1.661	1.818
		Molina	441,2	28,1	32,1	4	1.522	1.621
	Maule Valley	San Clemente	586,9	28,5	29,6	12	1.557	1.707
		Pencahue	448,2	27,5	31,4	6	1.528	1.645
		Mingre	151,4	29,5	32,5	9	1.366	1.469
	Empedrado	546,6	23,9	26,4	1	1.011	1.233	
	Cauquenes	246,4	30,9	32,2	7	1.631	1.679	



REGION AND SUBREGION DETAIL

Region	Valley	Site	Winter Rainfall (mm) Jun - Jul - Aug	Mean Maximum Temperature (C°)		Spring Frost (days)	Accumulated Degree-Days (C°) Oct-Mar 20-21	Accumulated Degree-Days (C°) Oct-Mar 19-20
				Feb 21	Feb 20			
South	Itata Valley	Treguaco	490,8	26,2	28,0	17	1.074	1.151
		Ranquil	322,2	29,2	30,1	1	1.628	1.702
	Bio Bio Valley	El Carmen	593,9	27,2	28,5	26	1.100	1.117
		Portezuelo	447,9	29,1	29,7	1	1.581	1.655
	Bio Bio Valley	Los Angeles	575,6	28,4	29,2	6	1.340	1.343
Malleco Valley	Angol	371,0	29,2	27,5	5	1.412	1.388	
	Puren	406,4	27,8	26,7	15	900	926	
		Traiguén	506,2	25,9	25,2	17	839	911

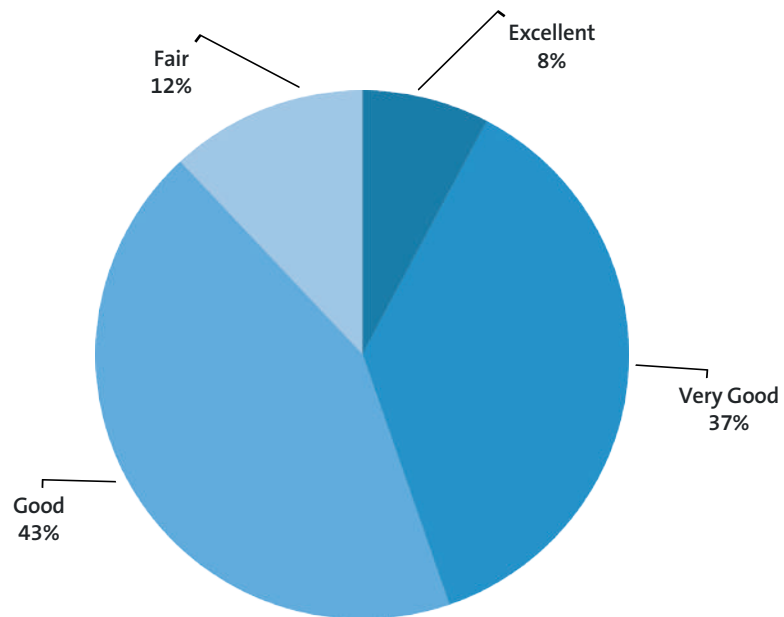


REGION AND SUBREGION DETAIL

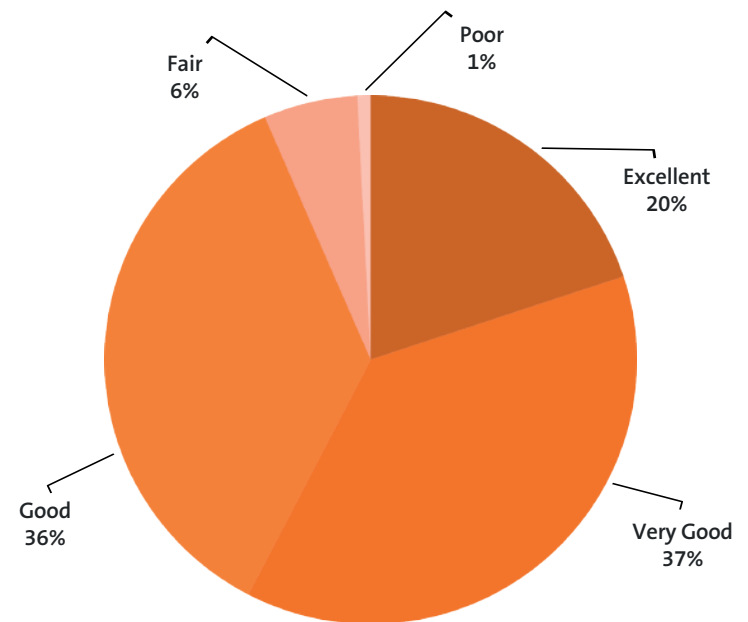
Region	Valley	Site	Winter Rainfall (mm) Jun - Jul - Aug	Mean Maximum Temperature (C°)		Spring Frost (days)	Accumulated Degree-Days (C°) Oct-Mar 20-21	Accumulated Degree-Days (C°) Oct-Mar 19-20
				Feb 21	Feb 20			
Austral	Cautin Valley	Vilcun	578,4	25,4	24,9	19	747	749
	Osorno Valley	Osorno	630,7	25,6	22,3	9	749	677

QUALITY ASSESMENT

Global Quality White Wines

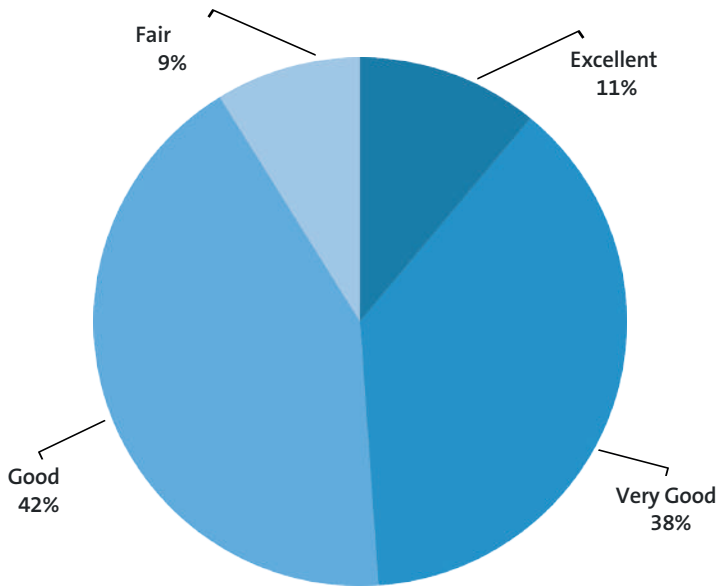


Global Quality Red Wines

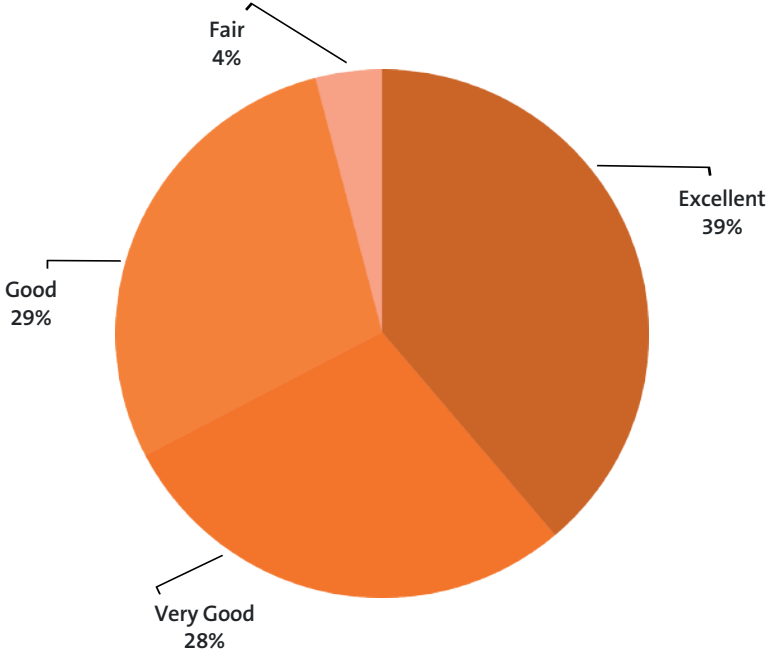


QUALITY ASSESMENT

Global Wine Quality Sauvignon Blanc

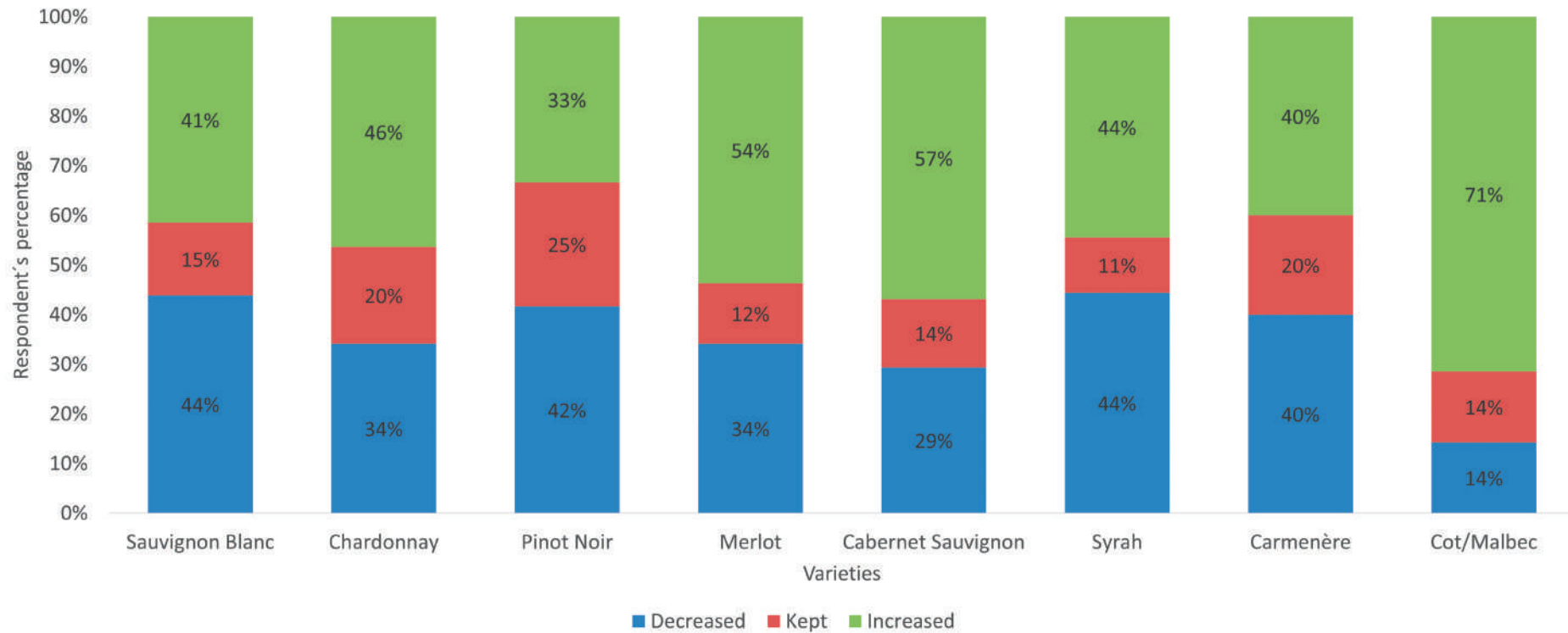


Global Wine Quality Cabernet Sauvignon



YIELDS COMPARISON

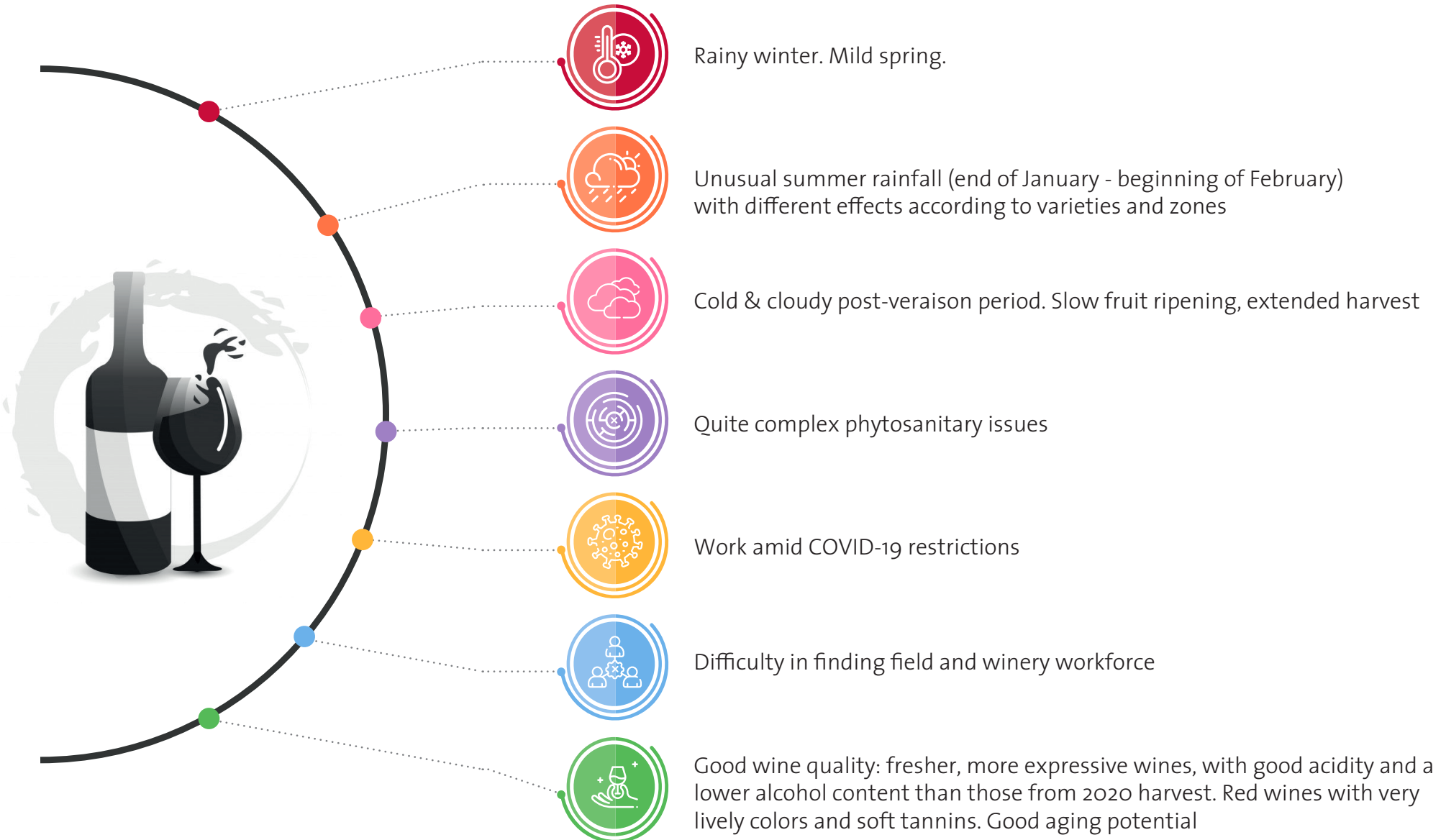
Change in producers' historical crop yield by variety
2020-2021 Season



- The global production of grapes from the 2021 harvest is estimated to be 10-20% higher than that of 2020, according to 74% surveyed producers.

CONCLUSIONS

THIS SEASON WAS CHARACTERIZED BY



THANKS

The preparation of this 2021's harvest report was possible thanks to the collaboration of various people and institutions.

The 87 wine companies that participated, through their winemakers, wine growers, owners or wine consultants were the following:

- | | | | |
|---------------------------------|------------------------|------------------------------|---|
| 1 Ayllú | 23 Don Raúl | 45 Marcela Parot Urzúa | 67 Santa Elisa de Litu |
| 2 Agrícola Antonia e Hijos | 24 Echeverría | 46 Millamán | 68 Santa Rita |
| 3 Almaviva | 25 El Escorial | 47 Monterrey | 69 Siegel |
| 4 Alquihue | 26 El Principal | 48 Montgras | 70 SNA Educa (Escuela Agrícola de Molina) |
| 5 Altacima | 27 El Rosal | 49 Montt | 71 Tabalí (Agrícola Río Negro) |
| 6 Andes Wines | 28 Emiliana | 50 Patacón | 72 Tarapacá |
| 7 Andesterra | 29 Flor Negra | 51 Pencopolitano | 73 Tierras Altas |
| 8 Aresti | 30 Gallo Chile | 52 Pichimapu | 74 Torreón de Paredes |
| 9 Aromo | 31 Garcés Silva | 53 Pino Román | 75 Transriego (Kamchatka) |
| 10 Baron Philippe de Rothschild | 32 Hugo Casanova | 54 Pisquera Monte Patria CCU | 76 Undurraga |
| 11 Calyptra | 33 Indómita | 55 Polkura | 77 Valdivieso |
| 12 Casanueva | 34 Itata Paraíso Wines | 56 PS García | 78 Valle Frío |
| 13 Casas del Bosque | 35 Korta | 57 Puertas | 79 Valle Secreto |
| 14 Casas del Toqui | 36 La Ronciere | 58 Puntí Ferrer | 80 Ventisquero |
| 15 Casas Patronales | 37 La Rosa | 59 Raynaud Lacaze Biowines | 81 Veramonte |
| 16 Chocalán | 38 Lagar de Codegua | 60 Requiringua | 82 Villard |
| 17 Concha y Toro | 39 Las Águilas | 61 Riberas del Maule | 83 Viñedos de Aguirre |
| 18 Cono Sur | 40 Las Veletas | 62 RR Wine | 84 Viñedos de Cuca |
| 19 Correa Albano | 41 Luis Felipe Edwards | 63 Saavedra | 85 Viñedos Marchigüe |
| 20 Cousiño Macul | 42 Los Boldos | 64 San Esteban | 86 Viu Manet |
| 21 Cremaschi | 43 Los Cerrillos | 65 San José Apalta | 87 William Fevre |
| 22 Del Pedregal Wines | 44 Los Nogales | 66 San Pedro | |

VINTAGE REPORT 2021

Executive Summary

Prepared on behalf of
Vinos de Chile

Vinos de Chile.
Wines of Chile



Asociación Nacional
de Ingenieros Agrónomos
Enólogos de Chile

