

# HARVEST REPORT SPAIN



2019-11

## PRODUCTION PER REGION

REGION	Prod. 19/20 (m.hL)	Dif. %
Galicia	0,90	- 10%
P. Asturias	0,001	- 25%
Cantabria	0,001	- 5%
Basque Country	0,82	- 10%
Navarra	0,40	- 35%
Rioja	2,27	- 20%
Aragon	1,45	- 10%
Catalonia	2,41	- 10%
Balearic	0,05	- 10%
C. and Leon	1,93	- 10%
Madrid	0,17	- 25%
C. la Mancha	19,97	- 30%
C. Valenciana	2,27	- 10%
Murcia	0,93	- 15%
Extremadura	2,99	- 30%
Andalusia	1,02	- 21%
Canary islands	0,05	- 35%
<b>Total</b>	<b>39,01</b>	<b>- 20%</b>

(Source: Spanish Ministry for Agriculture)

**WBWE Amsterdam**

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*The Spanish Ministry of Agriculture, estimates a total wine & most production around 39 m hL*

The Ministry of Agriculture and Fisheries has published the latest wine & most report, updating the total production figures. The early mention 37 million hL have become now 39 million hL. This new figure still implies a reduction of around 20% in comparison to last year.

Taking into account the average production figures published in the OIV report, this harvest will be 5 – 10% lower than average. Reduction, which should be covered by the existing quantities coming from the 18<sup>th</sup> harvest. According to the INFOVI in September Spain had around 8 million hL more stock than the previous year.

We had a very dry winter, with little rainfall, although some water was recovered during the spring. Summer has been dry, without the high temperatures like the ones suffered in Central Europe.

The vegetative state of the vines was good at the end of August, healthy grapes, with a high sugar content and phenols.

The early varieties, which began to be harvested at the end of August; such as Chardonnay, Sauvignon Blanc or Merlot have had a yield of about 70 – 60% compared to last year.

In general it has been a long harvest, which was interrupted by intermittent rains throughout the peninsula. If it is true that these latter rains helped to increase the efficiency of the grapes, the quality of some areas could have been compromised.

Both white and red wines will have a high alcoholic strength this year. Red wines in addition have enjoyed a high phenolic maturation, resulting in a higher color intensity.

### Vintage in Castilla la Mancha

Castilla- La Mancha represents vastly half of the Spanish wine harvest. The 2019/20 harvest in Castilla-La Mancha was somewhat longer than usual and was altered by heavy rainfall during the month of September. The low yield of the vines was caused by the water stress suffered during the spring.

With an amount close to 19 million hL, the production cut compared to last year is close to 30%; and slightly lower than the average of the last harvests.

The widespread price paid by private wineries in Castilla – La Mancha for both Airen (white wine) and Tempranillo and Bobales (red wines) wines have been lower than the prices paid previous year!

It should be noted, that there has been an increase of between 1.5 – 2.5 degrees Baumé in the grape collected. This increase in alcoholic strength, coupled with low yields in the Northeast area, can bring some challenges, especially to the sparkling industry or to markets seeking low degree wines.

The South Castilla- La Mancha, mainly the biggest production area, has also suffered a decrease in production comparable to the rest of La Mancha. This will allow them to reduce last year's stocks gradually.

The red wine area, Manchuela, reports lower losses than the rest. Red wines have a greater alcoholic strength and higher color this year.

### Vintage in C. Valenciana

The climate in this region has been quite benign with a cold winter, followed by some storms, which left good water reserves in the subsoil. Spring was cold and sprouting was delayed until well into May. The storms of early September left in some areas up to 80 mm of water! Although the statistics are not yet final for this region, Utiel-Requena (the highest production in the Valencia Community) should have a harvest similar to last year, with an average grade of more than 12% vol Alc. DO VALENCIA reports a reduction of around 15 – 18% in their area of influence. The fight in in the Valencia Community this year has been associated to grape prices for DO CAVA (mainly Macabeo), where large producers have paid lower amounts than previous years.

The harvest in the area of Alicante, Jumilla and Yecla passed without major complications, except for the storm of September 2<sup>nd</sup>. The quality of the grapes has been good, increasing the average degree in about 1.5 - 2% vol. Alc. The overall reduction in production will be around 20% in comparison to last year

### Vintage in Aragon and Navarra

The northern area of Spain, also considered the quality zone, has suffered the most due to the climate inclines. The scarcity of rain during the winter and spring as well as the heat at the end of June had a negative effect on the sprouting of the vines, causing a decrease of approximately 35%, reaching in some areas almost 45%!

### Vintage in Extremadura

The decline in production has been general, most prominent in the red grape (mostly Tempranillo) than in the white grape (Pardina). Total production is close to 3 million hl, a figure comparable with the vintage 2017. The alcohol degree of red wines is around 14 - 14.5% and it will possible to find wines above this graduation. White wines are close to 13% vol. Since 80% of the grapes are destined for cooperatives it is difficult to estimate the price of the grapes at this point, but it will end in line with the previous year, maybe a little lower.

### Vintage in Catalonia

The harvest in Catalonia, was generally equal or slightly higher than average of the last years; Except for those areas that suffered damage during the heat wave the heat wave between the 25 to 30 June. They mostly underwent the young vineyards with little water retention in the soil, especially the Carignan variety. According to the Councils of the Appellations of Origin ,the harvest came with some delay. As for the quality of the grape, it has been good and no disease has been reported.

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