HARVEST REPORT
2020 ARGENTINA

WINES OF ARGENTINA

AN UNFORGETTABLY CHALLENGING HARVEST

Almost every winery's doors are closed. There isn't a bunch left to harvest the length and breadth of Argentina – except in the deep south, in Chubut – while half the wine output for this year has already begun the ageing process. Nothing about this satisfyingly tranquil picture is unusual except for one thing: the date.

It's the beginning of May and, in Argentina, things aren't usually this way for at least a month. But nothing about the 2019-2020 season has been usual. If they had to sum it up in a single word, wine producers would choose 'challenging'. For two main reasons: firstly, none of the experts consulted for this report could remember a harvest ever having taken place this early, so it was special enough, but secondly there was the fact that it occurred amid the unprecedented crisis caused by the COVID-19 pandemic.

So the image of wineries enjoying the bucolic post-harvest lull comes as a great relief. Throughout the majority of Argentina, technicians had to tackle tricky logistical problems to press quantities that would ordinarily be processed in four months in just two. The reason for this race against time, which turned out to be a stroke of luck in the light of the pandemic, can be found in the meteorological records.

As we will see further on in this report, the unusual nature of the 2019-2020 season qualifies it for a place in the *hall of fame* of memorable harvests. Its two outstanding characteristics were the heat and lack of water.

In general terms – below is a breakdown by terroir – the recent harvest followed, in most of the wine-producing territories – Mendoza, San Juan and Northern Patagonia – a warm, dry summer that turned ripening expectations upside down. One meteorological station in Ugarteche, Luján de Cuyo, for example, recorded higher than usual average temperatures in December, January, February and March.

And this data was replicated across the region. With the exception of the Calchaquí Valley and some other high altitude locations, historically high temperatures were the norm. In fact, some areas of northern Mendoza experienced up to five weeks of heat waves involving temperatures above 32°C.

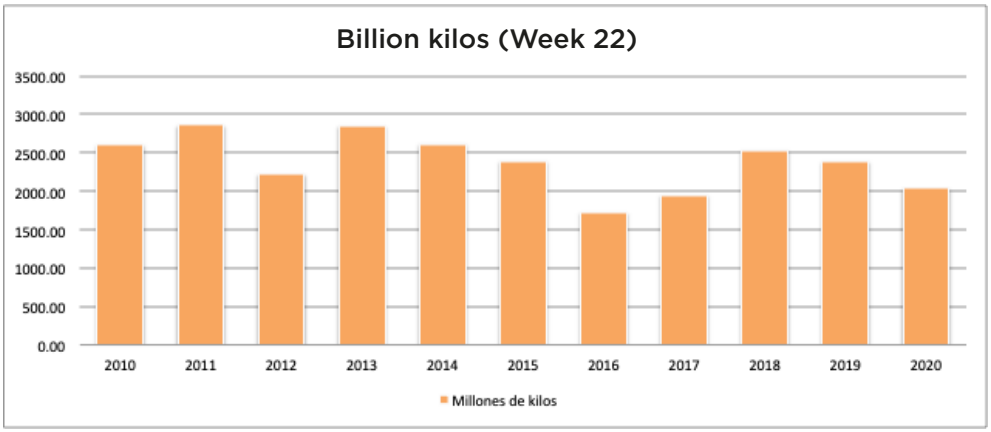
This situation was exacerbated by two further factors: Patagonia, San Juan and Mendoza were hit by late spring frosts that reduced yield, while the fact that vineyards were forced to reduce irrigation accelerated the ripening process. All of these elements: heat, lower yields, and lack of water, brought the harvest forward 2 to 4 weeks, depending on the location.

The challenge was to harvest and get the grapes into the wineries at record speed while also adapting the winemaking process to grapes that had grown under unprecedented conditions: a rare instance of sugar and phenol levels developing rapidly at the same time preserving outstanding levels of natural acidity, especially in reds that had been harvested at just the right moment.

One sovereign truth hovered over this entire harvest: if they were to get the results they wanted, winemakers would have to throw away the manual and treat each grape on its own merit. Their ability to forget their preconceptions and really read the ripeness of the harvest would be key.

LESS IS MORE: HARVEST VOLUMES

In week 22, 26 April, the National Viticulture Institute (INV) reported that 2.0368 billion kilos of grapes had been harvested and processed: a low figure for the decade, the average being 2.6187 billion kilos. This represents a fall of 23%.



Three factors account for this drop:

The invisible effect of the frosts

Although it is too early to tell which region or varietal was worst affected, we can identify some variables that defined the harvest and will certainly have resulted in a lower yield. There's a line from an old Argentine folk song: 'More is less, less is more, it all depends on the frost': this year's productivity was low because of the cold winter and spring, which mainly affected the Uco Valley and northern Patagonia. Several frosts coincided with the budding period – especially September which saw temperatures of -9,1°C in Paraje Altamira and the Uco Valley and -11°C in San Patricio del Chañar, resulting in a loss of fragile new growth. Subsequently, on the 17th another cold front hit the Uco Valley, Primera Zona and the east of Mendoza as well as Pedernal, the San Juan plains and Patagonia, with temperatures of below -1°C further impacting the new buds. Yields were thus substantially lower. The frosts – in the Province of Mendoza alone – affected a total of 9630 hectares, of which 2490 were completely destroyed.

Fewer storms

Although the frequency of hail storms overall was average for the region, the Calchaquí Valley (twice) and Gualtallary in Tupungato (four times) were particularly hard hit and on unusual dates. Again, data is only available for Mendoza where hail storms affected 7007 hectares 100% and damaged 15,553 in some way, according to the province's Department of Agricultural Meteorology.

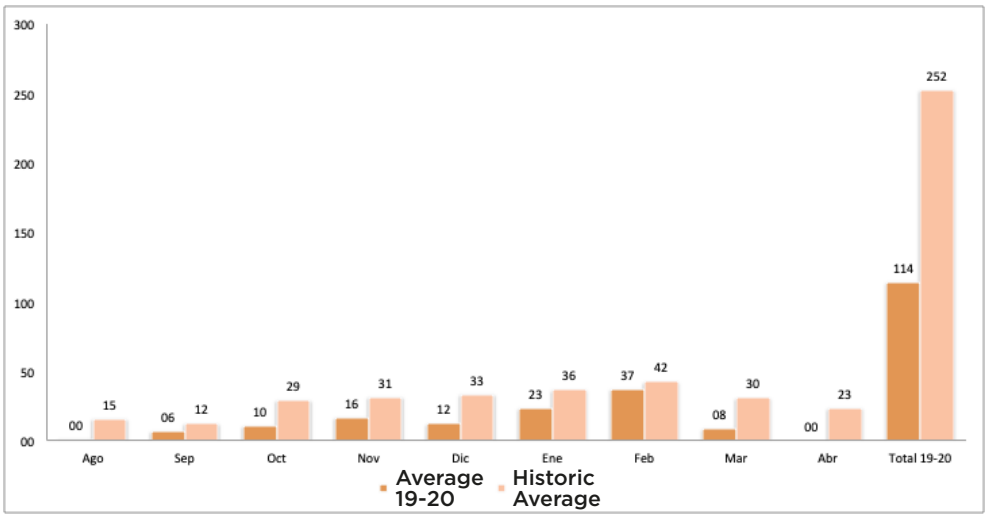
Drought

As regards rainfall, it was an especially dry year, aggravating an already existent drought emergency across most of western Argentina. Snowfall was not just at its lowest for the last 20 years in Mendoza, whose rivers were flowing at 50% of their usual capacity (11% lower than the previous year)

rainfall in general was also scarce, while in northern Patagonia it was less frequent than usual as well.

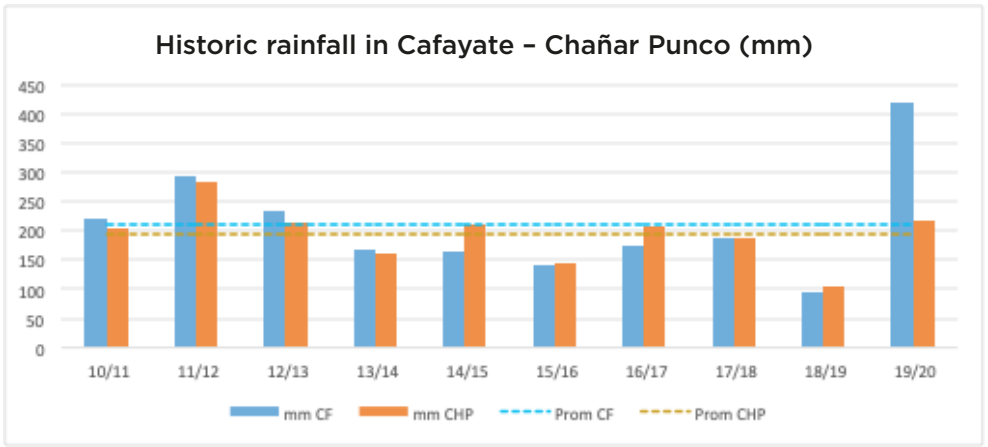
Focusing on the four oases of Mendoza, rainfall is general was 50% lower than average (113 mm compared to 252 mm). Water for irrigation was thus a valuable commodity that was not always supplied at regular intervals, and this was reflected, in the east of Mendoza especially, in the size of the bunches.

The chart below presents historic rainfall in the Province of Mendoza compared to 2020, during the growing season.



The northwest, however, experienced very different conditions: rainfall in the Cafayate region was extremely plentiful, reaching the highest levels ever recorded in the region: 420mm (the average is 209mm). This was not true of the Santa María area of the Calchaquí Valley or the north, which experienced average conditions.

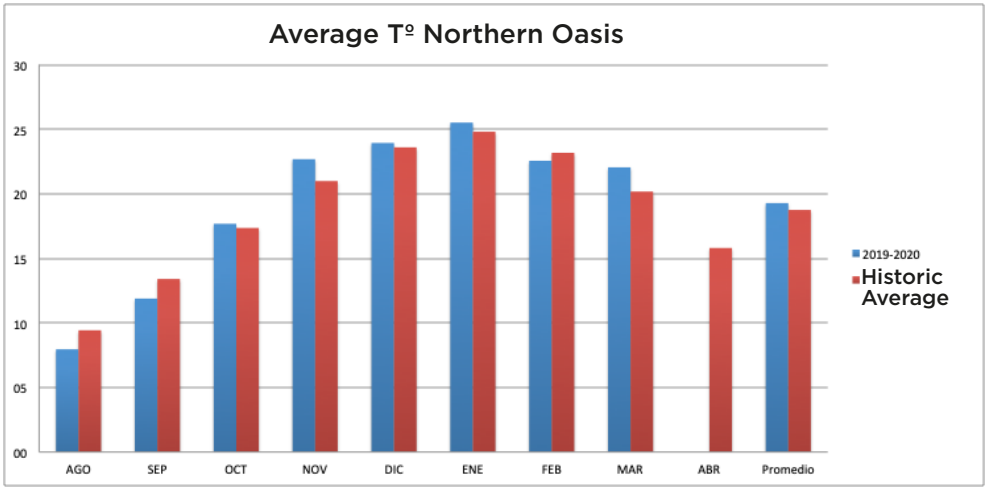
The following chart presents comparative figures for two vineyards belonging to El Esteco in Cafayate and Chañarpunco (Santa María), demonstrating the variation between the different growing seasons.

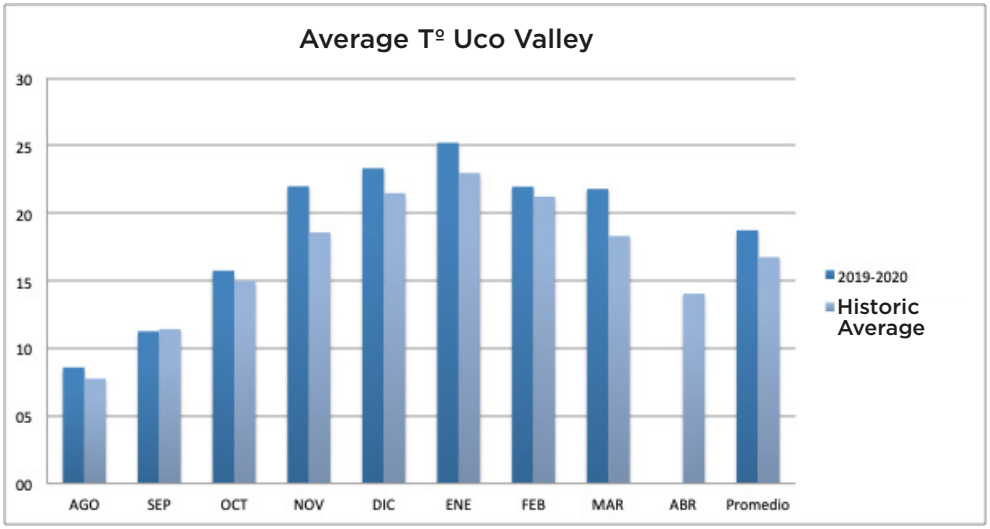


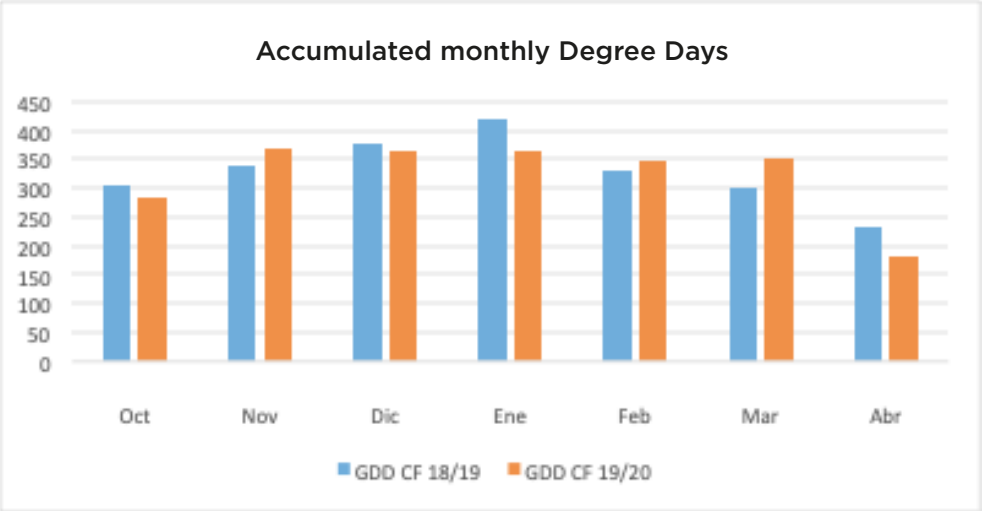
THE HOTTEST SUMMER ON RECORD

Although complete statistics aren't yet in, producers say that this was the hottest harvest of the past 50 years. The average temperatures appear to back that up. The data collected thus far includes:

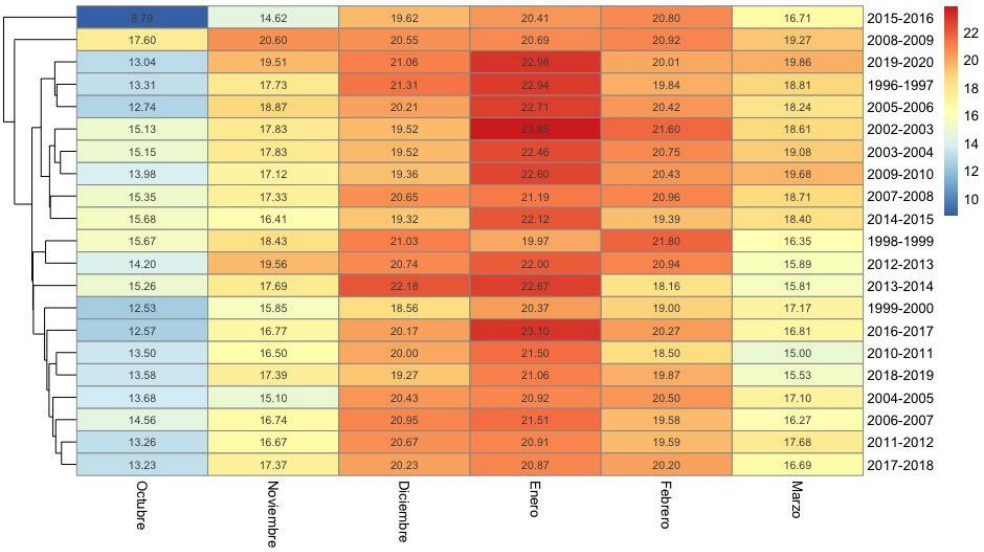
- Between 5 and 7 heat waves; defined as up to a week of temperatures above 32°C, from December to March in most wine producing regions, mainly from San Juan to the south and especially in the plains.
- Luján de Cuyo, to give just one example, recorded 55 days of temperatures higher than 32°C, when the average for the region is between 30 and 31 days.
- In the Uco Valley, meanwhile, March was hotter than February.
- Paraje Altamira, however, was an exception: in 2017 the region recorded higher average temperatures in December and January although February and March 2020 were the hottest ever.
- In northern Patagonia, the 2019-2020 cycle was the warmest ever, with December and January being especially hot.
- Cafayate and the Calchaquí Valley were the exceptions: their temperatures were normal for the area.







However, a month by month chart comparing the past 20 harvests at 3 vineyards of Catena Zapata in Tupungato, for example, which specializes in Pinot Noir, shows that the temperatures for the 2019-2020 harvest are similar to the 2005-2006 cycle. The key to the left shows the comparisons between harvests while the colours indicate average temperature within each time period.



For future discussion

This unusual harvest leaves several unanswered questions, chief among which is how to interpret the ripeness and how it is that during such a hot year, the grapes offer such freshness. 'You won't find that in any of the textbooks,' says Alejandro Sejanovich, the oenologist at Manos Negras.

Meanwhile, Fernando Buscema at the Catena Wine Institute says 'there's no correlation between temperatures recorded and the resulting wines. The temperatures don't explain the phenomenon. Our hypothesis is that the lack of water was the key factor in accelerating ripeness while preserving acidity. That would make much more sense. During a dry year like this one, the temperatures might soar but the plant won't necessarily experience those peaks.'

Martín Kaiser, an agricultural engineer at Doña Paula, noticed a similar phenomenon. 'It was certainly a hot summer but in general we didn't see many blockages. There was dehydration, which might accentuate the relationship between acidity and polyphenols. The high temperatures in March might also be another key factor.' Another of the explanations offered by Marcelo Belmonte, Director of Vineyards at Grupo Peñaflor is 'that in our analysis, which isn't complete, the most decisive factor in achieving the balance we're seeing in the wines comes from a leaf-fruit ratio weighted towards the leaves. With the reduced fruit yield and the heat, the plants may be better able to metabolize compounds that result in more polyphenols. In all, this harvest was unique for a hot year in terms of acid preservation, good colour and fresh aromas. The reasons for this are being studied but experts are pointing to the lack of rain being a key factor.'

ARGENTINA FROM NORTH TO SOUTH
NORTHERN VALLEYS

JUJUY / QUEBRADA DE HUMAHUACA

Cutting across the Tropic of Capricorn at between 2500 and 3300 metres above sea level, the Quebrada de Humahuaca escaped the early frosts during the 2019/2020 season. 'The climate behaved normally, with average levels of rainfall (under 200/220) and good health, so the ripeness in the valley reached good sugar levels with potential alcohol greater than 14% but less than 15%. Overall acidity rarely reached 6 for most of the varietals while the pH was never higher than 3.6,' says Ezequiel Bellone Cecchin, an agricultural engineer working in the region.

SALTA / CAFAYATE

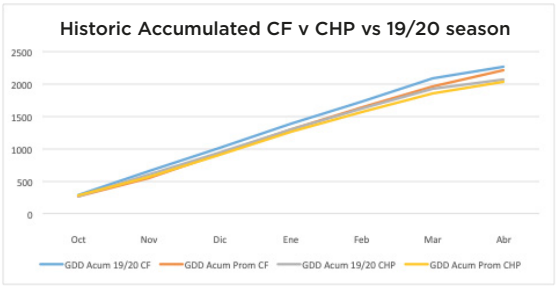
The 2019/2020 season was a curious one in the Cafayate Valley due to the historically high level of rainfall: the most recorded since 1985 at 450mm between spring and summer, rather than falling during harvest season as would be typical. However, the rain fell mostly in northern Cafayate, which also experienced hailstorms between December and January while to the south it was as much as 100mm less.

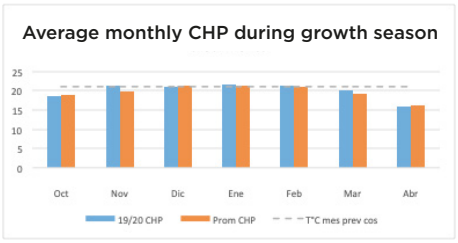
Producers report that this resulted in a reduction in output of between 10 and 20%. However, Francisco Tellechea, the agricultural engineer at El Esteco, says 'The region was able to deal with the rainfall because of the sandy soils, with limestone and rock, which don't retain much water. The wind also helped to dry the land.'

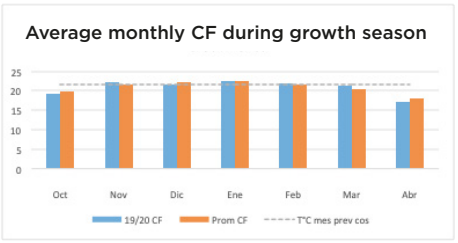
Nonetheless, he observed a 10-day delay in the beginning of budding while the other phenolic cycles were similar to the previous season. Ripening also occurred at a similar pace thanks to higher temperatures in February and March, similarly to the 2018-2019 season.

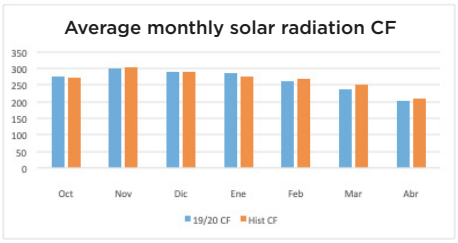
'The biggest challenge was undoubtedly the compression of the harvest into the first half of March,' says Jorge Noguera, an oenologist at Bodega Amalaya.

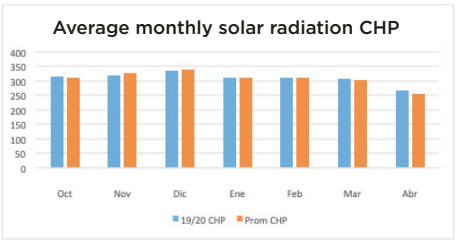
The following charts reflect a year that very much went to plan.











SALTA / HIGH ALTITUDE VALLEYS

In the area north of the Calchaquí Valley known as Alto Valle, in the northwest of the Province of Salta, in contrast to Cafayate, the season began dry. This was followed by a hot November and December. The first rain arrived in the middle of January, concentrating in summer to reach 200/220mm, which helped to balance out the high temperatures and allow for a slow, full ripening process.

In Colomé, for example, 'the harvest was brought forward about a fortnight and was finished by the beginning of April when it usually goes on until May. The early date was caused by a warm March that required we speed up the harvest process. The production levels were ideal,' says Thibaut Delmotte, Head of Oenology at Grupo Colomé.

In Pucará and Seclantás, the initial dry spell reduced yields by 20 to 30%. In Payogasta, a period of low temperatures during the flowering period along with a minor drought due to reduced rainfall led to lower than expected yields.

LA RIOJA

With vines located between 770 and 1850 metres above sea level, La Rioja is the third largest wine-producing province in Argentina in terms of output. It possesses 7809 planted hectares mainly in the Famatina region, making up 3.5% of all the vines in the country.

Winter 2019 was fairly brief and mild with cool temperatures and frosts in July and August. At the beginning of September low temperatures were recorded that did not affect the budding of the wine grapes, which occurred satisfactorily from the middle to the end of the month. The Zonda warm wind phenomenon may have affected growth but not to a major degree.

The summer of 2019-2020 began with good temperatures in December and January. In fact, from 4 December to 15 January every day was measured at over 32°C, except on two occasions when the mercury only got to 30. In general, the nights were cool with low relative humidity. This good thermal range favoured the veraison and ripening of the fruit. Some rain was recorded at the end of December while hail caused some damage to vineyards in the west.

'Because of the climatic conditions, the harvest was brought forward 10 days but it was a healthy year with a good relationship between acidity and pH, better than previous years. There was excellent colour for the reds with good concentration, a little more alcohol than previous years but only by a couple of tenths,' says Matías Prieto, Winemaker for Chañarmuyo Estate.

SAN JUAN

San Juan is the second largest winemaking province in Argentina by output, with a total planted surface area of 46,667 hectares, accounting for 23% of harvested volume.

SAN JUAN – TULLUM VALLEY

The Tulum Valley, where the city of San Juan is located, is the main winemaking area in the province. Here, the 2019/2020 season was heavily affected by the climatic conditions and the scarcity of water.

On the one hand 'the spring frosts, mainly in September, occurred prior to budding and had two significant consequences for the harvest. There was an appreciable reduction in output, with percentages varying between different areas of the valley depending on the severity of the frost and the specific grape in question. There were falls in varietals such as Chardonnay, Viognier, Syrah and Malbec, among others. The lower yield improved the ratio of leaves to fruit in the crops while the scarcity of water for irrigation during certain periods of the cycle led to smaller grapes with better skin/pulp ratio and greater concentration, resulting in better quality,' say the agricultural engineers at Bodega Callia in their harvest report.

Maximum temperatures were higher than usual from spring through to mid-March. Only during most of February did they ease up a little. This, together with the lack of rainfall, led to very healthy vines and an early harvest.

SAN JUAN – PEDERNAL VALLEY

Located in San Juan, in the foothills of the Andes, the Pedernal Valley is home to high-quality wine-making grapes, with its 1300 planted hectares located between 1200 and 1500 metres above sea level.

A long, cold winter with low rainfall and only two instances of minor snowfall was followed by a cool spring with frosts on 2 and 5 of September and 17 October. The latter occurred when the plants had already budded, causing considerable damage. From then on temperatures rose and stayed high.

'Through agricultural management, which we adapted to meet the needs of each micro-terroir, especially in terms of irrigation, we managed to ensure that the veraison of the plants' foliage was fully formed and optimal in terms of size, quality and uniformity. The ratio between fruit and foliage was excellent,' says the agricultural engineer Gustavo Matocq, at Pyros Wines.

The grape ripening process – in January, February and part of March – was affected by the dry climate and slightly higher than average temperatures that stayed within the ideal range for the plants.

The favourable environmental conditions, and excellent levels of foliage and water management ensured optimal ripening for the grapes. As a result, 'the grapes contained "sweet" gentle tannins, excellent acidity, a very intense colour and plenty of fruit and concentration," says Matocq.

OVERVIEW OF MENDOZA

In the leading wine-producing province in Argentina, with 153 thousand hectares of vines, 'the 2020 harvest was an emotional roller coaster. It occurred 20 days early due to the high temperatures and scarcity of water, forcing us to get the grapes in within a very short time period, while February saw several summer storms that caused landslides in a few of the vineyards. And then there was the pandemic, of course,' says Pamela Alfonso, agricultural engineer at Bodega Alta Vista.

However, each region experienced slightly different conditions.

The northern Oasis

Located around the provincial capital, this region includes 60% of the vineyards of Mendoza and is a dry, warm area in the best of times but this season the heat was even more extreme and water and rainfall even more scarce.

'The 2019/2020 cycle was especially brief. Affected by a frost in early spring, the area experienced the most accelerated phenolic development in the province and general grape yields were 15% lower than the previous year,' says Luis Coita Civit, agricultural engineer at Durigutti Family Winemakers.

Hail storms and frosts were restricted to the east. The Rivadavia and Santa Rosa areas were most affected by the intense spring hailstorms. Only the frosts at the beginning of October, where temperatures reached below zero in some districts to the east, affected end yields.

Primera Zona

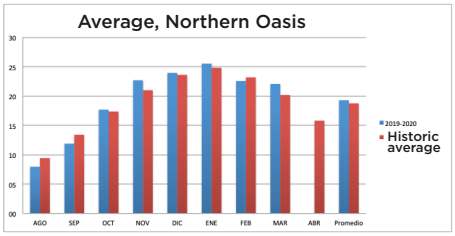
The main cause of the drop in output was the frosts rather than hailstorms, something also true of the Uco Valley. In Primera Zona, they were restricted to specific locations, while two hail storms with intermediate to medium-sized stones hit concentrated areas.

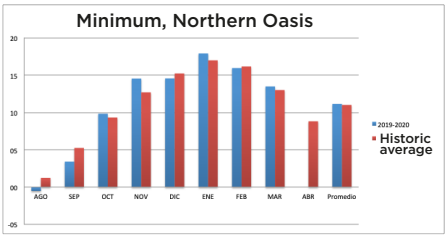
In Perdriel, Gonzalo Carrasco from Terrazas de los Andes reports that one frost 'with temperatures as low as -1,5°C hit on 17 October reducing the number of bunches and thus a 26% drop in yield compared to the previous year. The rest of the season was dry with rainfall in February of 120 mm, although this did not affect the general health of the crop.'

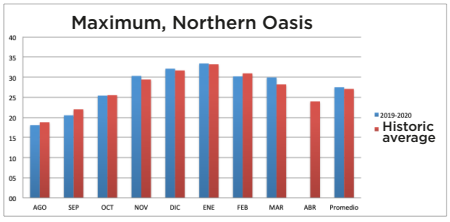
In Las Compuertas, the highest and coolest area in Luján de Cuyo, the oenologist Pablo Durigutti notes that 'minimum temperatures in summer were generally above 12° C, while eight days saw temperatures rise above 34°C. However, the levels of acidity were slightly higher than the previous year because of the good concentration caused by a cool spring. February, which is normally a month with moderate temperatures, was very warm due to the reduced rainfall compared to previous years in the area.'

In Agrelo, another important district in the region, the key factor was the clay in the soils. 'During a warm year like this one, the soil stayed damp and regulated the temperature. So the low yields of Malbec and Cabernet, together with the regulation of the soils resulted in a fantastic year,' says Alejandro Vigil, Chief Wine Maker at Bodega Catena Zapata, which possesses several strategically located vineyards.

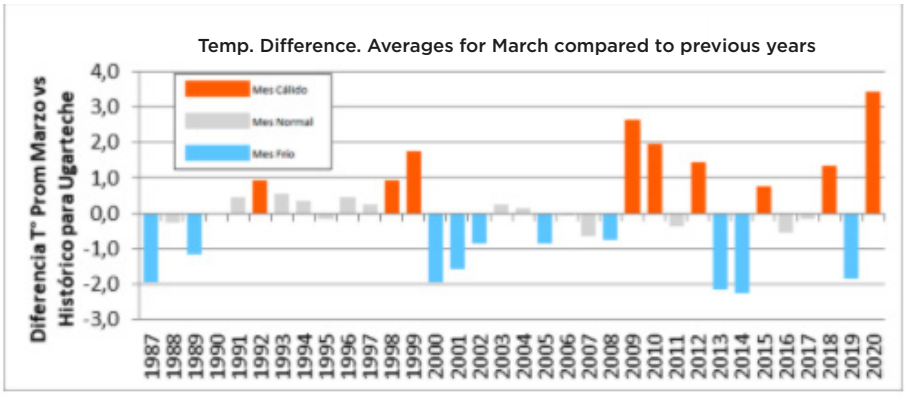
The following charts present a breakdown of the temperatures recorded in Luján de Cuyo; averages, maximums and minimums, as reported by different weather stations.

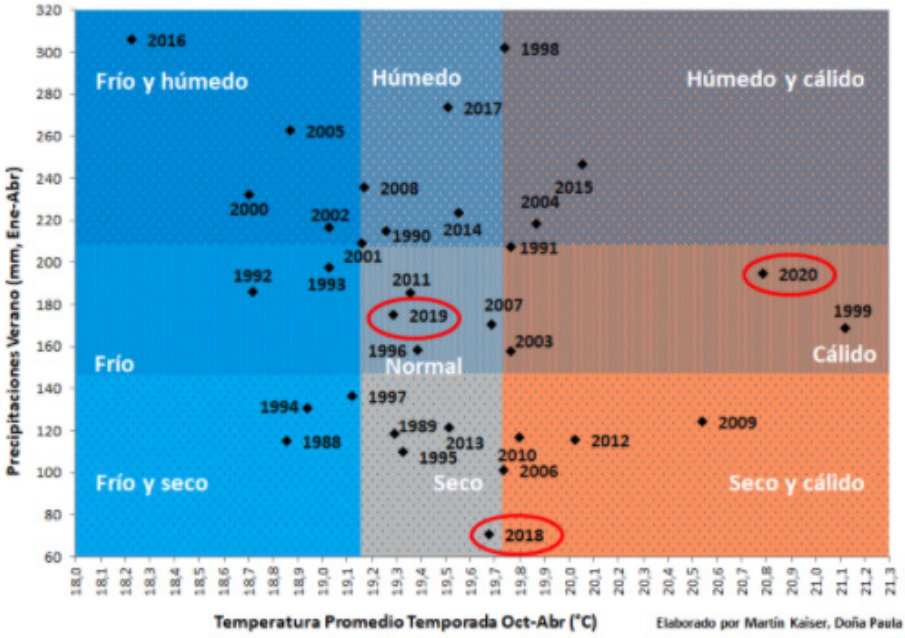






A longer set of data beginning in 1987, from a weather station in Ugarteche, Luján de Cuyo, puts the 2019-2020 season in greater context. The information was prepared by the agricultural engineer at Doña Paula, Martín Kaiser:





Uco Valley

In Los Árboles, Tunuyán, Jorge Cabeza, Winemaker at Bodega Salentein, says 'there were 8% fewer days above 30°C, but 10% more days with temperatures above 33°C compared with 2018-2019. That means there were fewer hotter days overall but the ones that were were more extreme and they were concentrated at the end of the season, bringing the harvest forward and rapidly increasing sugar concentrations.'

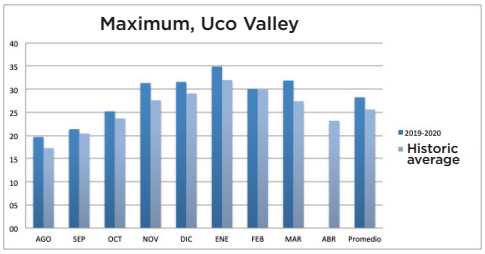
In the San Pablo area, which is 1400 metres above sea level, Cabeza says: 'We had frosts in October which had consequences for the yield and meant that the budding, growth and ripening occurred at different times. The varietals affected were mainly Sauvignon Blanc, Merlot and Pinot Noir. Because Malbec has a later cycle, it escaped the event.'

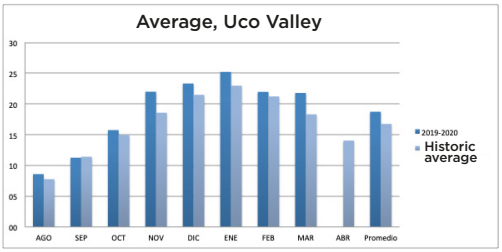
In Gualtallary, Tupungato, the climate was very unusual, especially in the northwest of the district. By mid-October, two minor but lengthy frosts (between -0.5 and -1°C) lasting between 48 and 72 hours had an effect on the development of sensitive varietals, especially Malbec. Although the area is generally considered to be safe from hail storms, two large ones occurred on 21 November and 3 December, affecting production levels. The damage was between 40 and 60%. 'Because the storms came early, some vines recovered and got to harvest with a good canopy and plenty of leaves but lower yields, creating very concentrated grapes,' says Edgardo del Pópolo at Susana Balbo Wines.

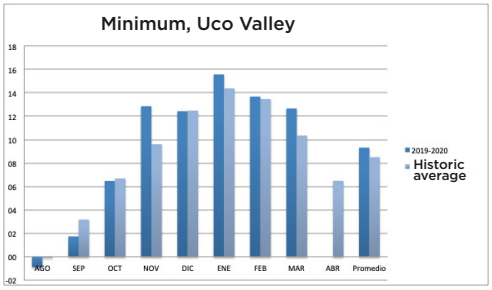
Laura Principiano, Oenology Manager at Zuccardi in the Uco Valley says this was a 'viticulturalist's harvest'. Having received just 80/90 mm of rainfall by early February, in the south of the Uco Valley (Paraje Altamira, La Consulta, Pampa El Cepillo) the season was warm and dry with low yields and rapidly ripening grapes that reached the required sugar levels between 8 and 15 days earlier than normal. 'Those vineyards that managed to get to the beginning of March with good canopies and in good state in terms of water were able to ripen their bunches properly and avoid some being over-ripe.'

In the same region, the oenologist Philipe Rollet at Bodegas Caro, reports: 'The harvest window shrunk dramatically. The Cabernet matured at the same time as the Malbec. But the mystery is that high degrees of acidity were preserved. We had a Cabernet with a pH of 3.35 and a Malbec with pH 3.30. Those are dream levels'.

The following charts provide further information on the average maximum and minimums and the average overall during the growth cycle taken from different weather stations across the valley.





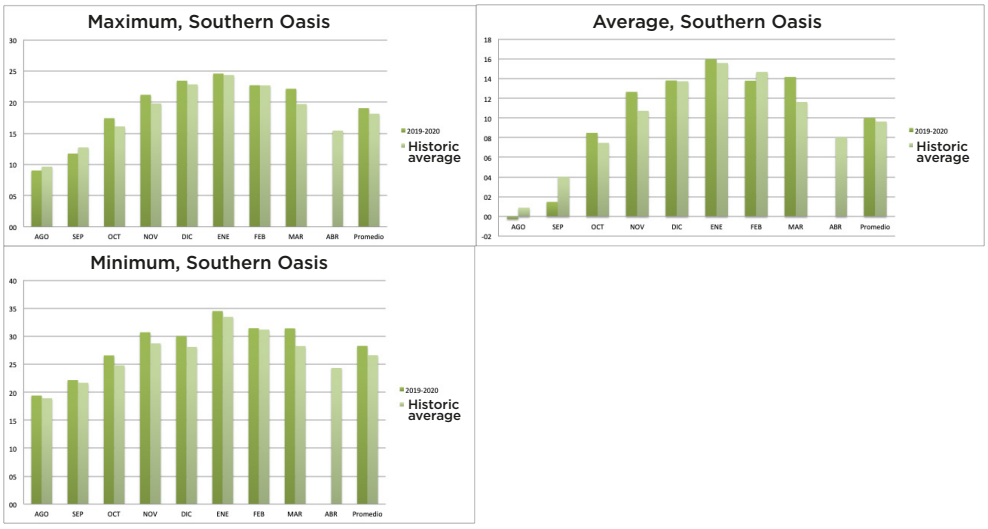


San Rafael

In the Southern Oasis, the 2019/2020 season was similar to the rest of the province: a dry year, early, lengthy budding, high temperatures, scarce water and early ripening leading to a challenging harvest with considerable drops in yield.

In Gualtallary, Tupungato, the climate was very unusual, especially in the ‘The recently un-casked musts and wines display excellent qualities in terms of colour, structure, aroma (slightly reduced among the whites) and high alcohol levels. This all leads to expectations that 2020 wines will be high quality, rich and well-rounded,’ says Pablo Minatelli, head of vineyards at Bodegas Bianchi.

The charts show the average maximum and minimum temperatures as well as the averages for each month of the growth cycle.



PATAGONIA & THE ATLANTIC COAST

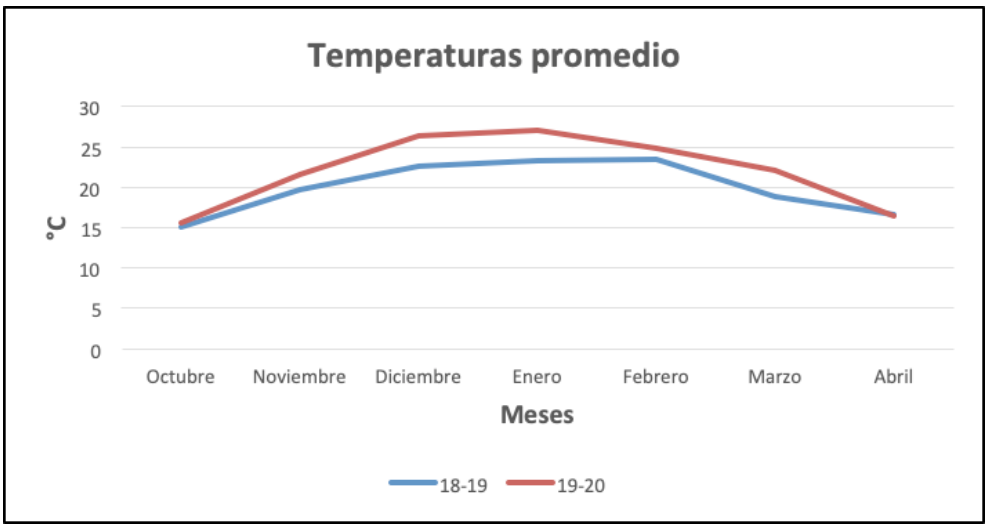
NEUQUÉN / SAN PATRICIO DEL CHAÑAR

The province of Neuquén contains 1762 hectares of vineyards located to the north of Patagonia. A critical time during the dry year was the September frosts. The lowest temperature recorded was -11°C followed by an October where temperatures ranged around 0°C, causing losses of 20% in the area, especially among the Pinot Noirs and Cabernet Sauvignons.

As regards the development of the climate, ‘December 2019 and January and February 2020 were warm months and that brought ripening forward between 12 and 15 days, centred around a shorter maturation period for the different varietals,’ says Leonardo Puppato, Head of Production and Oenology at Bodega Familia Schroeder.

Similarly, Ricardo Galante at Bodega del Fin del Mundo, says that by 26 March, the harvest had been completed. ‘It was a spectacular year for quality but unusual because of the acidity we achieved by harvesting early.’ Good aromas, high acidity and a lengthy finish are what we can expect from the region in terms of reds.

The following chart compares the temperatures experienced during the 2019 harvest compared to the 2020 one as recorded by a weather station at San Patricio del Chañar.



RÍO NEGRO / GENERAL ROCA & MAINQUE

With 1618 hectares of vineyards distributed across a valley system located in the basin of the Rivers Colorado and Negro, Río Negro province accounts for 0.75% of Argentina's wine output. The epicentre is Alto Valle de Río Negro although the vineyards stretch all the way to San Javier, just a few miles from the Atlantic Ocean.

'The combination of heat and dryness indicated that we should expect higher levels of sugar in the grapes. The early samples showed high levels of sugar concentration and so a technical decision was taken to maintain the intensity of the irrigation as often as possible,' says Agricultural Engineer Juan Martín Vidiri, Director of Production at Establecimiento Humberto Canale, located in Alto Valle de Río Negro.

In February, there was a 'wide thermal range although the maximums stayed close to 30°C until March. The harvest began and ended earlier than usual,' says Hans Vinding Diers, owner and winemaker at Bodega Noemia, located in Mainqué, Río Negro. '2020 looks very promising with more austerity and less fruit than 2019 but greater health and freshness.'

Finally, in San Javier, the heat was made up for by the 'cool nights thanks to the ocean winds. This resulted in wines of good acidity and structure,' concludes Fabián Valenzuela, oenologist at Bodega Wapisa.

CHUBUT / TREVELIN & CAPITÁN SARMIENTO

The Province of Chubut is the most southerly winemaking region in the world with 75 hectares, three quarters of which are planted in Capitán Sarmiento, an arid region in the central steppes.

'The consistently warm weather would have brought the harvest forward about 40 days. The warm period began on 28 February and continued until the end of the harvest but, unusually, there were also 15 frosts, compared to 6 the previous year. That held back the harvest a little,' says Juan Pablo Murgia, oenologist at Bodega Otronia.

The remaining 25 hectares are spread across the west of the province in the Andes, where the vineyards are located at 650 metres above sea level and rainfall is about 950mm during the growing period.

In Trevelin, 'Together with the high temperatures, what made this season unique was that between December 2019 and 28 March 2020 there were no frosts. Only in late March and early April did the seasonal rain come, along with 10 days of frost, which reached -2,7°C,' reports Marcelo Yagüe, producer and owner of Casa Yagüe.

BUENOS AIRES / CHAPADMALAL

Located 8 kilometres from the sea, this small but growing region experienced a slightly warmer and quite dry 2019-2020 season compared to the average, with the hottest March in 59 years. Ezequiel Ortego, oenologist at Costa & Pampa says that 'the quality of the 2020 harvest is exceptional, we made more aromatic wines than in previous years with good natural acid levels and balanced vine output.'

THE BARRELS AND SPRING

Right now, some reds are in their cellars completing fermentation while others have already left the barrel chamber to begin the ageing process. The whites are almost finished with the exception of those undergoing malolactic fermentation in the barrel.

As ever, until the wine is in the bottles, it is too early to say anything about the 2020 vintage. However, instinct and preliminary data provided by agricultural engineers and oenologists allow us to venture one or two opinions: similarly to the very cold season of 2016, although for the opposite reason, the results for 2020 will depend greatly on how winemakers and oenologists read their harvests. The ones who make the correct decisions will have plenty of stories to tell about this hurried, dry and warm harvest in the growing shadow of COVID-19. As they uncork their wines, they will describe an unforgettably challenging harvest and toast to celebrate the ways in which they overcame it.

Let's hope that this will be true for the great majority of the industry.

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