

2. Wine production in Austria

2.1. The 2019 vintage, harvest and inventory

The 2019 vintage: the 'nine' legend lives on

In 2019, the warm and fairly dry winter (which can hardly be classed as such) was followed by an unsettled spring. April was very warm again, while May was the coldest it has ever been since 1991. This, with the abundance of rain in May, slowed down the growth of the vines. Fortunately, all regions were spared late frosts. Looking back on it, this humid period was without a doubt a godsend because it played a critical role in ensuring that the vines made it through the hot summer months unscathed. Ultimately, it also led to distinctly different aromatics from those of the preceding vintage, in which the vines did not have this 'reservoir' of water to fall back on. The vines came into flower at the usual time of year and the weather remained favourable throughout the flowering period, which meant that losses due to *coulure* were minimal.

Summer began with the hottest, driest June since records began, which was followed by an almost equally hot July and August. However, the heat waves were not as extreme as in 2017 and 2018 and no hailstorm damage was reported.

The end of August saw the start of a cooler period that primarily brought pleasantly cool night temperatures with it. This had a positive effect on the fruit aromas and acidity of the wines. Autumn was very mild and balanced, which meant that the main harvest could take place according to plan and in no rush, particularly helped by the absence of longer periods of rain. Throughout all winegrowing regions, the grapes were fully ripened and in perfect health because the previous high temperatures and dryness had kept the vast majority of fungal infections or putrefaction at bay.

White wines exhibit a rare elegance

All white wine varieties are characterised by an invigorating freshness and a radiantly clear interplay of fruit, accompanied by an acidity whose structure is very distinctive for such a warm year. Even in the early stages, the white wines displayed a rare elegance and harmony.

Niederösterreich's flagship grape variety, Grüner Veltliner, was more varietally typical and multidimensional than it has been for a long time. Alongside the characteristic pepper and the tobaccoey spice, this vintage displays pronounced fruit aromas that also lend the lighter wines great tension and expression. The Rieslings from the strongholds of Wachau, Kamptal, Kremstal and Nussberg (Wien) have not only turned out tremendously juicy and fruity, but also have a definite zesty acidity.

Pretty much the same can be said about the Burgenland appellations, with some very strong-structured, mature and aromatic Pinot Blanc and Chardonnays having been pressed from the area around the Leitha Range, for example. Moreover, the alcohol content is rather moderate compared to some previous years.

Styrian winemakers are also enjoying an excellent vintage in which the wines seem to exhibit perfect balance in the early stages. Their praised Sauvignons and Muscats display an impressive abundance of fruit, without appearing presumptuous or unilateral in any way.

The optimal conditions of 2019 have also had a tangible beneficial effect on the increasingly popular domestic specialities such as Roter Veltliner, Rotgipfler, Zierfandler and Furmint, as well as on the Wiener Gemischter Satz, which is still on the rise.

Vintage forecasts, which inevitably include comparisons to years gone by, often refer to the 2015 and 2017 vintages, some of which perhaps turned out a little denser. However, the vintages of 2009, 1999 and 1979 are also cited from time to time – does this mean that the ‘9’ legend lives on with 2019? To some extent, it seems certain that this year’s vintage will have a long storage life, a property shared with the vintages mentioned above.

Another vintage of top red wines

As we look forward to an equally highly rated red wine vintage we can also look back with both satisfaction and amazement on the recent past, with Austria having enjoyed five very good to outstanding red wine vintages in a row from 2015 onwards – albeit with a small deviation in 2016. A phenomenon that no one would ever have thought possible – until recently!

The 2019 vintage is consistently deep in colour, extremely dense and rich in extracts, while also exhibiting remarkable levels of acidity and tannin. All things considered, we can expect to see structured, sturdy red wines with great depth and complexity, which should easily be able to hold their own against the great vintages of 2011, 2015 and 2017. This applies across all of the main red winegrowing regions and grape varieties, although we can already notice that climate change is particularly favourable to varieties such as Cabernet and Syrah, which have sometimes struggled to reach full maturity in Austria in the past. Blaufränkisch, Zweigelt and St. Laurent have also been favoured by Mother Nature, leading to a high degree of ripeness and a perfect bill of health, so that we can expect well-balanced wines with great juice and density among these varieties. The same applies to Pinot Noir, although in years that are as hot as this one, vineyard management and choosing the right time to harvest this capricious grape variety are of critical importance.

Low yields of sweet wine

It is still too early to report about dessert wines with absolute certainty. However, very fine *botrytis* wines are expected from the Seewinkel region, while Ruster Ausbruch will be rare due to a massive number of grapes being eaten by starlings. There were no severe night frosts – with the exception of a few nights – which meant that frozen grapes could only be harvested for Eiswein on the odd occasion. As a result, it is safe to expect a small vintage of sweet wine in general.

2.1.1 The 2109 harvest²⁹

A total of 2.32 million hl of wine was produced in Austria in 2019 (as at 30 November). The harvest volume corresponded, therefore, to the five-year average (+1%) but was 16% lower than the exceptionally large harvest of the previous year. The 1.62 million hl of white wine represents a decrease of 13% compared to the harvest volume of the previous year (+5% compared to the five-year average), while the red wine harvest volume of 700,000 hl was 22% lower than in 2018 (-6% compared to the five-year average).

Contrary to the extraordinarily early flowering and harvesting of vines last year, these occurred at the usual times again in the 2019 growing season. A mild and dry start to the year – marked by no cold spells and no damage from late frosts – was followed by an unsettled, warm April and the coldest May since 1991, which slowed down growth of the vines. The weather for the rest of the year saw the hottest June since records began and a hot summer with little rainfall, which had a positive effect on the quality of the grapes but resulted in slightly fewer and smaller grapes.

Particularly in Burgenland, the high temperatures led to a lower juice yield. This meant that the 566,400 hl wine harvest represented a decrease of 28% compared to 2018 (6% below the five-year average). The losses affected all regions to a similar extent. Both the Neusiedlersee

²⁹ Source: Statistics Austria Final Report on Harvest and Inventory 2019

(347,100 hl) and Leithaberg (106,800 hl) regions harvested 29% less wine than in 2018. The Mittelburgenland (96,100 hl) recorded a 24% drop compared to the previous year. Altogether, harvests of white wine (253,400 hl, -29% on 2018) saw almost the same production losses as red wine (313,000 hl, -27% on 2018).

Niederösterreich harvested 1.49 million hl: a 12% drop compared to 2018, albeit slightly higher than the average harvest of the last five years (+2%). The drop in harvest volume compared to the previous year was more pronounced for red wines (327,900 hl, -19%) than it was for white (1.16 million hl, -10%). While the Weinviertel – which accounted for almost half of the state's area under vine – witnessed a comparatively moderate decrease (815,100 hl; -7% on 2018) and Wachau reported hardly any losses compared to 2018 (74,000 hl; -2%), a significant drop in the volume of wine harvested compared to last year was recorded in the Thermenregion (65,400 hl, -24%), Kamptal (184,900 hl; -22%) and Kremstal (128,600 hl; -19%).

In Steiermark, as much wine was harvested in 2019 as in 2018 ($\pm 0\%$), thanks to the somewhat rainier conditions. The harvest volume of 240,300 hl represents an increase of 21% on the five-year average. The winegrowing regions of Südsteiermark (119,800 hl, -2%) and Vulkanland Steiermark (87,500 hl, -4%) recorded slightly smaller harvests than in 2018, while the volume harvested in Weststeiermark increased by 21% to 32,900 hl.

In Wien, the volume harvested was 24,400 hl, which was the same as the five-year average ($\pm 0\%$) but represented a decrease of 15% compared to the previous year.

With regard to Qualitätswein and Prädikatswein, the harvest was reported at 2.14 million hl (16% decrease in volume on 2018, +1% compared to the five-year average). The drop in volume was felt slightly more by red wines (629,300 hl, -23% on 2018) than by high-quality white wines (1.51 million hl, -14% on 2018). The Wein and Landwein segments (including single varietal wine and Sturm) represented 152,900 hl, which is a 4% decrease on the previous year (+10% on the five-year average). Within this segment, the volume of white Wein/Landwein grew by 2% to 100,800 hl whereas the volume of red Wein/Landwein dropped by 13% to 52,100 hl.

2.1.1.1 Overview of 2019 harvests by wine region³⁰

Federal states or wine regions	White wine			Red and rosé wine			Total wine		
	Area in production in ha ¹⁾	Yield in hectolitres		Area in production in ha ¹⁾	Yield in hectolitres		Area in production in ha ¹⁾	Yield in hectolitres	
		total	per ha		total	per ha		total	per ha
Burgenland	5.781	253.447	43,8	8.053	312.998	38,9	13.834	566.446	40,9
Neusiedlersee ²⁾	3.980	180.143	45,3	4.018	166.944	41,5	7.998	347.086	43,4
Leithaberg (Neusiedlersee-Hügelland) ²⁾	1.429	61.512	43,0	1.384	45.257	32,7	2.813	106.769	38,0
Mittelburgenland ²⁾	176	6.802	38,7	2.371	89.344	37,7	2.547	96.146	37,7
Eisenberg (Südburgenland) ²⁾	196	4.991	25,5	279	11.454	41,0	475	16.445	34,6
Niederösterreich	21.728	1.160.963	53,4	7.286	327.850	45,0	29.014	1.488.813	51,3
Thermenregion	1.025	35.658	34,8	885	29.760	33,6	1.910	65.418	34,2
Kremstal	2.219	105.285	47,5	497	23.362	47,0	2.716	128.647	47,4
Kamptal	3.196	150.626	47,1	857	34.247	39,9	4.053	184.873	45,6
Wagram	2.172	108.048	49,7	621	29.160	46,9	2.794	137.209	49,1
Traisental	718	37.185	51,8	166	6.882	41,4	884	44.067	49,8
Carnuntum	410	18.405	44,9	499	19.874	39,8	909	38.279	42,1
Wachau	1.264	68.978	54,6	126	5.049	40,1	1.390	74.027	53,3
Weinviertel	10.701	635.760	59,4	3.629	179.329	49,4	14.330	815.089	56,9
übrige	22	1.018	45,6	6	187	32,4	28	1.205	42,9
Steiermark	3.893	186.823	48,0	1.204	53.434	44,4	5.096	240.257	47,1
Südsteiermark	2.144	103.451	48,2	346	16.366	47,3	2.490	119.817	48,1
Weststeiermark	195	11.684	60,0	467	21.234	45,4	662	32.917	49,7
Vulkanland Steiermark (Südoststeiermark)	1.554	71.689	46,1	390	15.834	40,6	1.944	87.523	45,0
Wien	513	20.204	39,4	114	4.216	37,0	627	24.419	39,0
Übrige Bundesländer	105	2.947	28,0	44	1.481	33,3	150	4.428	29,6
Österreich 2019	32.020	1.624.384	50,7	16.701	699.979	41,9	48.721	2.324.363	47,7
Österreich 2018	32.028	1.861.046	58,1	16.617	892.435	53,7	48.645	2.753.481	56,6
Österreich Ø 2014-2018	30.599	1.547.697	50,6	15.751	744.064	47,2	46.350	2.291.761	49,4

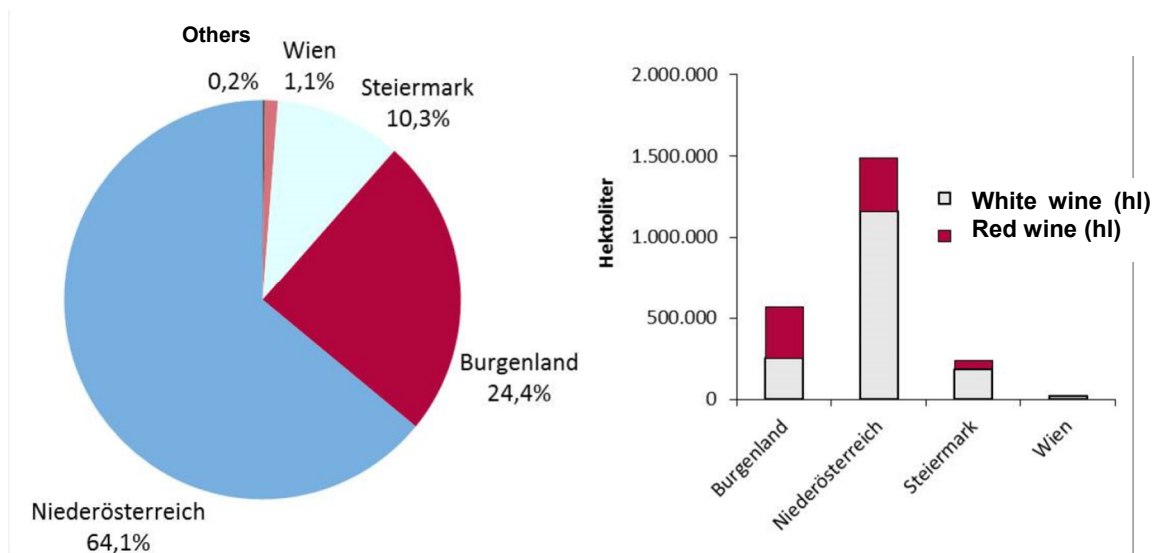


Figure 7: Shares of the grape harvest 2019 in hectolitres by federal state

³⁰ Source: STATISTICS AUSTRIA, Survey of Harvests; Austrian Ministry of Agriculture, Regions and Tourism (BMLRT). Compiled on 2 March 2020 – 1) Areas under vine for red and white wine production according to the 2015 Survey of Area under Vine. Results by winegrowing region, based on yield estimates by the Statistics Austria's Wine Harvest Experts.

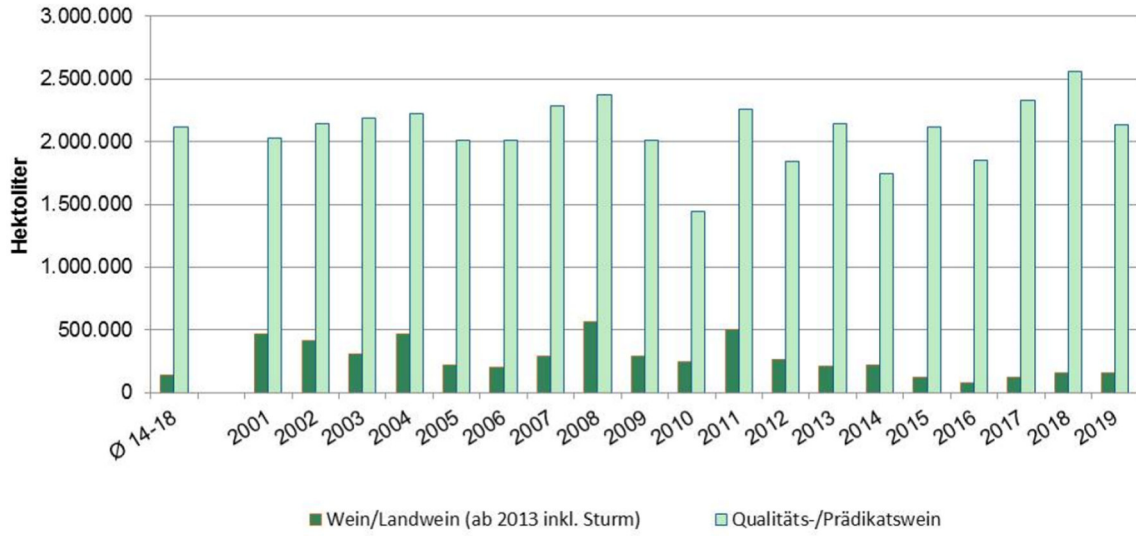


Figure 8: Harvests 2001–2019 in hectolitres by quality level

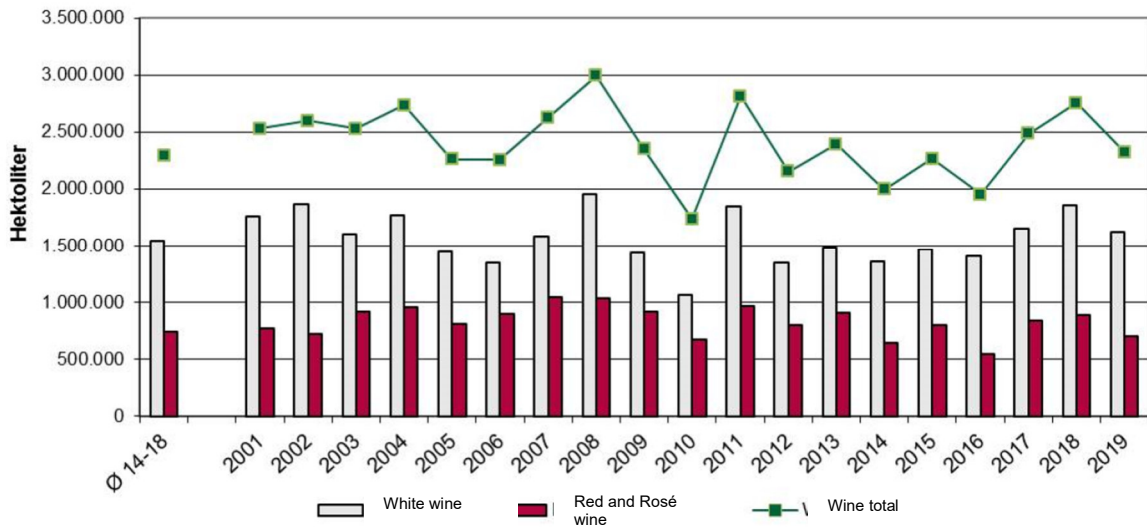


Figure 9: Harvests 2001–2019 in hectolitres

2.1.2 The 2019 inventory³¹

The 2019 wine inventory (as at 31 July) was calculated at 2.98 million hl – again recording a significant increase compared to the previous year (+12% on 2018) and the five-year average (+19%). Indeed, this figure is the highest it has been in the last ten years. 61% of the inventory (1.82 million hl) was located in Niederösterreich, which corresponds to an increase in inventory of 12% compared to 2018. Burgenland's inventory, which accounted for over a quarter (26%) of the Austrian wine inventory, increased by 13% to 768,200 hl. Increases in inventory were also recorded in Steiermark (+15% to 246,500 hl; share of 8%) and Wien (+12% to 127,600 hl; share of 4%). Considering Austria as a whole, the white wine inventory (1.73 million hl) rose slightly more (+14% compared to 2018) than that of red wine (1.26 million hl; +10% compared to 2018).

In the Qualitätswein and Prädikatswein segment, the inventory reserves increased to 2.43 million hl (+13% on 2018; +23% compared to the five-year average). In Niederösterreich, which has the most extensive Qualitätswein and Prädikatswein inventory (1.52 million hl; a share of 62%) an increase of 13% was recorded. Compared to 2018, the inventory also increased significantly in Steiermark (+19% to 188,700 hl), Burgenland (+13% to 681,000 hl) and Wien (+9% to 31,900 hl). The Austrian inventory of white Qualitätswein and Prädikatswein totalled 1.36 million hl (+15% on 2018), while red Qualitätswein and Prädikatswein totalled 1.07 million hl (+11%).

Wein and Landwein (including varietal wine and Sturm) recorded an increase in inventory to 296,200 hl (+9% on 2018), this being 12% higher than the five-year average. The Wein and Landwein inventory comprised 195,700 hl of white wine (+14% on 2018) and 100,500 hl of red wine (+2% on 2018).

	Wein	Landwein	Qualitätswein	Prädikatswein	Grape must	Rectified grape must	Semi-sparkling wine	Wine from 3 rd countries	Wine from other EU states	Total
Burgenland	25.041	28.484	648.875	32.140	975	428	27.686	1	4.591	768.219
Kärnten	129	139	1.687	13	-	-	418	-	-	2.386
Niederösterreich	36.138	142.876	1.493.691	23.042	847	706	61.843	2.510	58.805	1.820.456
Oberösterreich	521	150	1.733	11	-	-	675	-	963	4.053
Salzburg	-	-	1	-	-	-	25	-	-	26
Steiermark	12.462	27.707	186.954	1.752	154	12	10.742	84	6.617	246.483
Tirol	142	2.596	4.105	30	-	-	370	259	4.211	11.713
Vorarlberg	260	623	1.308	9	-	-	148	33	1.580	3.961
Wien	16.028	2.947	31.626	307	243	3	50.153	3	26.306	127.616
Österreich 2019	90.720	205.521	2.369.981	57.304	2.218	1.149	152.059	2.890	103.072	2.984.914
Österreich 2018	67.058	203.549	2.101.793	44.496	3.488	979	126.941	2.209	105.336	2.655.848

Figure 6: Inventory 2019

³¹ Source: Statistics Austria, inventory and harvest data are final numbers for 2019

2.2. Austrian harvests 1950–2019

The table below shows Austrian harvest volumes from 1950 to the present day:

in hl	Volume	Volume	Volume	Volume	Volume
1950	1,291,355	1965	1,387,371	1980	3,086,422
1951	1,103,790	1966	1,453,588	1981	2,085,168
1952	746,092	1967	2,594,384	1982	4,905,651
1953	826,093	1968	2,477,241	1983	3,697,925
1954	1,638,762	1969	1,465,101	1984	2,518,918
1955	1,164,232	1970	1,916,130	1985	1,125,655
1956	390,391	1971	1,812,790	1986	2,229,845
1957	1,415,427	1972	2,595,615	1987	2,183,623
1958	1,897,077	1973	2,404,307	1988	3,502,457
1959	727,952	1974	1,664,924	1989	2,580,861
1960	897,487	1975	2,704,467	1990	3,166,290
1961	1,328,221	1976	2,901,040	1991	3,093,259
1962	1,006,661	1977	2,594,021	1992	2,588,215
1963	1,826,741	1978	2,366,278	1993	1,865,479
1964	2,840,169	1979	2,773,006	1994	2,646,635
				1995	2,228,969
				1996	2,110,332
				1997	1,801,747
				1998	2,703,170
				1999	2,803,383
				2000	2,338,410
				2001	2,530,576
				2002	2,599,483
				2003	2,529,846
				2004	2,734,561
				2005	2,264,018
				2006	2,256,296
				2007	2,628,020
				2008	2,993,722
				2009	2,351,873
				2010	1,737,454
				2011	2,814,754
				2012	2,154,755
				2013	2,391,948
				2014	1,998,685
				2015	2,268,403
				2016	1,952,531
				2017	2,485,708
				2018	2,753,480
				2019	2,324,363

Figure 7: Austrian harvest volumes 1950–2019

Harvest volumes have averaged 2.3 million hl over the past 60 years. Over the last 15 years, volumes have settled at around 2.4 million hl (see the red line in Figure 8).

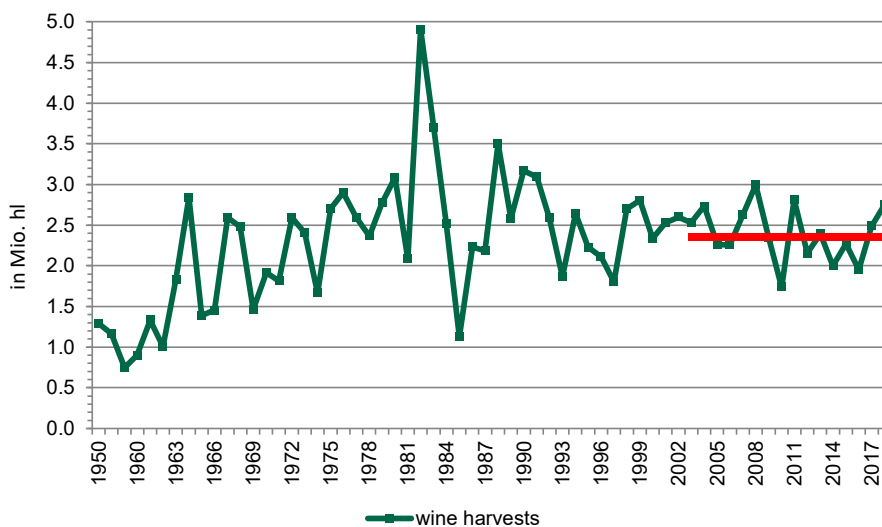


Figure 8: Austrian harvests 1950–2019

2.3. Prices of grapes and bulk wine

The average prices for grapes and bulk Qualitätswein over recent years were as follows:

	2000	2003	2006	2009	2012	2015	2016	2017	2018	2019
Wine										
Grapes, white per kg	0.25	0.27	0.34	0.29	0.82	0.67	1.03	0.61	0.25	0.29
Grapes, red per kg	0.37	0.50	0.34	0.22	0.49	0.33	0.83	0.54	0.25	0.29
Bulk										
Qualitätswein, white per l	0.35	0.39	0.41	0.42	1.05	0.71	0.81	0.92	0.56	0.40
Qualitätswein, red per l	0.61	0.85	0.42	0.38	0.77	0.47	0.58	0.94	0.57	0.38
Bottled										
Bottle, white, per 0.75 l	3.04	3.40	*	*	*	*	*	*	*	*
Bottle, red, per 0.75 l	3.11	3.57	*	*	*	*	*	*	*	*

Figure 9: Average prices for bulk and bottled wine in euro (excl. VAT)³²

Austrian Qualitätswein is increasingly sold in bottles, the cost of which is subject to wide variation. Different business and marketing models sometimes lead to significant price differences. This explains why recording a weighted average price for bottled wines for the purposes of the statistics on producer prices in agriculture and forestry became increasingly difficult and had to be discontinued in 2005, in liaison with the Federal Ministry of Agriculture and the Austrian Chamber of Agriculture.

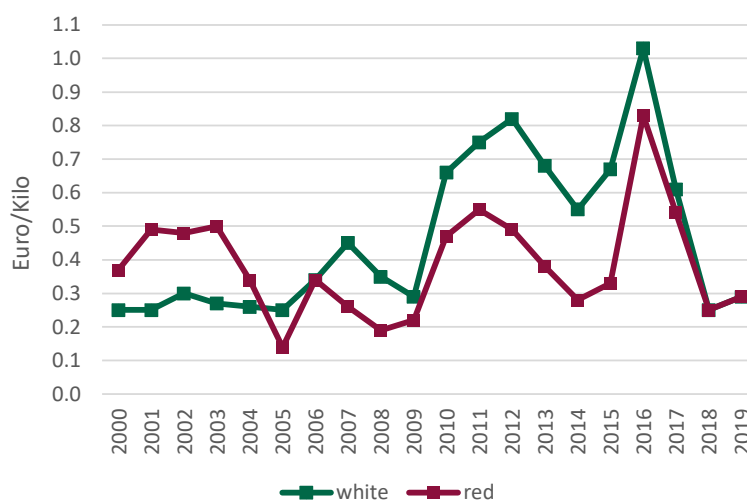


Figure 10: Evolution of bulk wine prices in litres 2000-2019

³² Source: Statistics Austria, „Land- und Forstwirtschaftliche Erzeugerpreise 2000 bis 2019“ (Producer Prices in Agriculture and Forestry between 2000 and 2019)

* Data not available

2.4. Climate and climate change

Climate change has occasioned a large number of discussions in the wine industry over recent years. The following climate data from selected wine-producing municipalities shows a continuous increase in temperature, as well as in precipitation and hours of sunshine, at almost all measuring stations since 1961.

Temperatures in selected Austrian wine-producing municipalities

in m/°C	Altitude	Avg. temp. 1961–1990	Avg. temp. 1990–2004	Avg. temp. 2004–2017	Difference 1990–2004 vs 2004–2017
Illmitz (B)	117	10.9	10.3	11.3	1.0
Neusiedl am See (B)	154	10.3	10.5	11.4	0.9
Deutschkreutz (B)	192	9.9	-	10.5	-
Wörterberg (B)	400	9.4	8.8	10.1	1.3
Bernstein (NÖ)	600	8.4	9.0	9.2	0.2
Eisenstadt (B)	184	10.4	10.3	11.0	0.7
Graz (ST)	337	9.5	9.7	10.6	0.9
Deutschlandsberg (ST)	353	9.3	9.2	9.8	0.6
Leibnitz/Silberberg (ST)	332	9.5	9.2	10.2	1.0
Hollabrunn (NÖ)	253	9.0	9.4	9.9	0.5
Falkenstein (NÖ)	302	9.2	-	10.2	-
Retz (NÖ)	320	9.2	9.6	10.2	0.6
St. Pölten (NÖ)	273	9.4	9.6	10.2	0.6
Baden, Bad Vöslau, Gumpoldskirchen (NÖ)	230	10.0	10.2	11.1	0.9
Schwechat (NÖ)	184	9.9	10.2	11.0	0.8
Tulln/Langenleobarn (NÖ)	175	9.5	10.0	10.6	0.6
Krems (NÖ)	204	9.6	9.7	10.4	0.7
Langenlois (NÖ)	204	9.2	9.6	10.2	0.6
Wien - Hohe Warte	198	10.3	10.6	11.1	0.5

Figure 11: Average annual temperatures in °C³³

³³ Source: ZAMG 2018

2.4.1 Maximum and minimum temperatures

in m/°C	Altitude	Avg. max. in August 1961–1990	Avg. max. in August 1990–2004	Avg. max. in August 2004–2017	Avg. difference 1990–2004/ 2004–2017	Avg. min. in January 1961–1990	Avg. min. in January 1990–2004	Avg. min. in January 2004–2017	Avg. difference 1990–2004 / 2004–2017
Illmitz (B)	117	29.0	33.4	34.2	0.8	-12.0	-13.0	-11.0	2.0
Neusiedl am See (B)	154	32.0	33.6	34.5	0.9	-12.0	-12.0	-10.6	1.4
Deutschkreutz (B)	192	32.0	-	33.1	-	-13.0	-	-12.1	-
Wörterberg (B)	400	30.0	29.2	31.5	2.3	-12.0	-12.0	-10.9	1.1
Bernstein (NÖ)	600	28.0	30.4	29.8	-0.6	-12.0	-11.0	-11.0	0.0
Eisenstadt (B)	184	32.0	33.1	33.6	0.5	-12.0	-11.0	-10.4	0.6
Graz (ST)	337	30.0	32.3	32.4	0.1	-12.0	-13.0	-9.9	3.1
Deutschlandsberg (ST)	353	31.0	32.4	32.3	-0.1	-14.0	-15.0	-12.2	2.8
Leibnitz/Silberberg (ST)	332	32.0	33.0	33.0	0.0	-16.0	-13.0	-12.8	0.2
Hollabrunn (NÖ)	253	32.0	32.8	33.0	0.2	-15.0	-14.0	-14.1	-0.1
Falkenstein (NÖ)	302	33.0	-	33.5	-	-14.0	-	-13.1	-
Retz (NÖ)	320	32.0	32.5	32.5	0.0	-14.0	-12.0	-11.2	0.8
St. Pölten (NÖ)	273	33.0	32.9	33.2	0.3	-12.0	-13.0	-11.4	1.6
Baden, Bad Vöslau, Gumpoldskirchen (NÖ)	230	32.0	33.0	33.8	0.8	-11.0	-11.0	-10.7	0.3
Schwechat (NÖ)	184	32.0	33.0	33.5	0.5	-13.0	-13.0	-10.6	2.4
Tulln/Langenlebam (NÖ)	175	32.0	33.5	33.8	0.3	-14.0	-14.0	-12.5	1.5
Krems (NÖ)	204	32.0	32.9	33.3	0.4	-12.0	-13.0	-12.1	0.9
Langenlois (NÖ)	204	32.0	33.0	33.3	0.3	-13.0	-13.0	-11.9	1.1
Wien - Hohe Warte	198	32.0	33.0	33.5	0.5	-10.0	-10.0	-9.7	0.3

Figure 12: Average maximum air temperature in August³⁴ and minimum air temperature in January³⁵ in °C

2.4.2 Precipitation and sunshine hours

Rainfall in mm Sunshine in hr	Altitude	Rainfall 1961–1990	Rainfall 1990–2004	Rainfall 2004–2017	Difference 1990–2004 vs 2004–2017	Sunshine 1961–1990	Sunshine 1990–2004	Sunshine 2004–2017	Difference 1990–2004 vs 2004–2017
Illmitz (B)	117	595.0	571.0	617.1	46.1	1,832.0	2,080.0	2,176.2	96.2
Neusiedl am See (B)	154	597.0	550.0	595.4	45.4	1,862.0	2,010.0	2,185.2	175.2
Deutschkreutz (B)	192	594.0	-	703.1	-	1,830.0	-	1,963.2	-
Wörterberg (B)	400	754.0	894.0	684.6	-209.4	-	1,965.0	2,157.9	192.9
Bernstein (NÖ)	600	749.0	771.0	765.0	-6.0	-	-	2,048.2	-
Eisenstadt (B)	184	619.0	642.0	726.4	84.4	1,859.0	2,022.0	2,142.8	120.8
Graz (ST)	337	838.0	844.0	892.6	48.6	1,844.0	1,880.0	2,126.0	246.0
Deutschlandsberg (ST)	353	1153.0	968.0	1,017.1	49.1	1,874.0	1,937.0	2,042.2	105.2
Leibnitz/Silberberg (ST)	332	917.0	934.0	931.5	-2.5	1,639.0	-	2,158.6	-
Hollabrunn (NÖ)	253	519.0	490.0	520.9	30.9	1,778.0	-	1,997.8	-
Falkenstein (NÖ)	302	509.0	-	572.8	-	1,655.0	-	2,081.1	-
Retz (NÖ)	320	435.0	490.0	488.6	-1.4	1,651.0	1,896.0	1,972.7	76.7
St. Pölten (NÖ)	273	696.0	660.0	773.4	113.4	1,717.0	1,780.0	1,963.8	183.8
Baden, Bad Vöslau, Gumpoldskirchen (NÖ)	230	596.0	685.0	676.4	-8.6	1,712.0	1,809.0	1,917.9	108.9
Schwechat (NÖ)	184	543.0	578.0	554.5	-23.5	1,773.0	-	2,056.8	-
Tulln/Langenlebam (NÖ)	175	641.0	594.0	685.1	91.1	-	1,755.0	1,959.8	204.8
Krems (NÖ)	204	521.0	529.0	544.9	15.9	1,721.0	1,780.0	1,815.7	35.7
Langenlois (NÖ)	204	481.0	481.0	553.9	72.9	1,667.0	1,758.0	1,824.2	66.2
Wien - Hohe Warte	198	607.0	648.0	690.8	42.8	1,771.0	1,969.0	2,084.4	115.4

Figure 13: Average annual rainfall³⁶ and sunshine³⁷

³⁴ Average maximum air temperature for August, measured in °C; Calculation of monthly maximum = maximum of all daily maximums in the month

³⁵ Average absolute minimum air temperature for January, measured in °C; Calculation of monthly minimum = minimum of all daily minimums in the month

³⁶ Average total annual precipitation, unit = mm; Calculation of annual total = total of all daily precipitations

³⁷ Average total annual sunshine duration, unit = hr; Calculation of total annual sunshine duration = total of all hours with sunshine duration

2.5. The composition of the Austrian wine-producing industry

2.5.1 Average size and number of grape growers

The composition of the wine-producing industry has changed profoundly over the past 30 years, both in terms of size and the number of producers. On the one hand, the drastic reduction in the number of wine estates is due to the fact that a large number of grape growers with a vineyard surface area of less than one hectare have ceased to exist. On the other hand, the average producer size has increased significantly, due to the increase of the number of producers with more than 5 ha. There is, therefore, a noticeable shift towards larger business structures along with a decrease in the number of smaller producers. This is also linked to how the business is run. There is a correlation between the size of businesses and businesses that are run on a full-time basis.

	Number of producers	Area in ha	Ha per producer
1987	45,380	58,188	1.28
1999	31,946	48,558	1.52
2009	20,181	45,586	2.26
2015	14,111	45,439	3.22

Figure 14: Evolution of the number of wine producers and average size of producer, 1987–2015³⁸

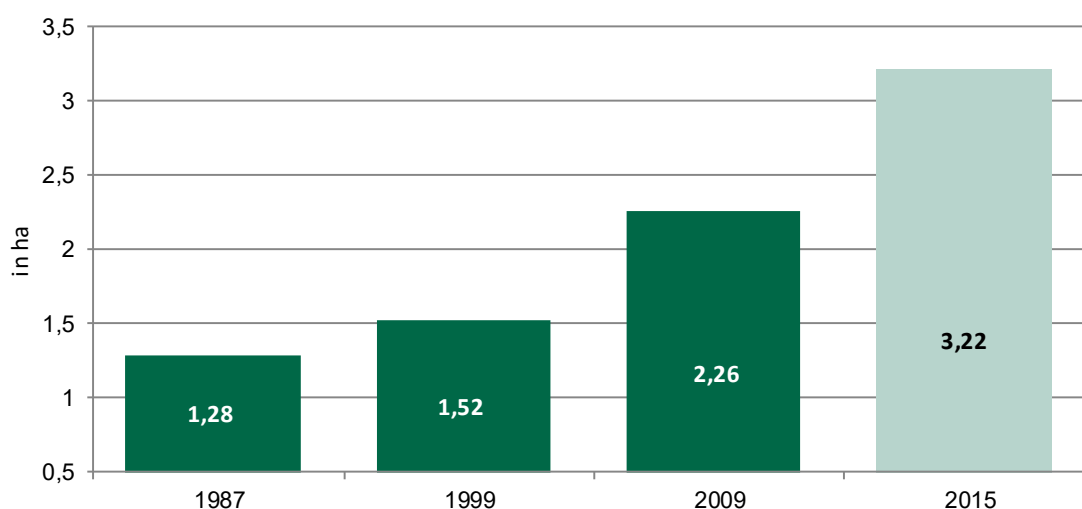


Figure 15: Evolution of the average producer size³⁹

³⁸AWMB, based on Statistics Austria Survey of Area under Vine from 1987, 1999, 2009 and 2015

³⁹AWMB, based on Statistics Austria Survey of Area under Vine from 1987, 1999, 2009 and 2015

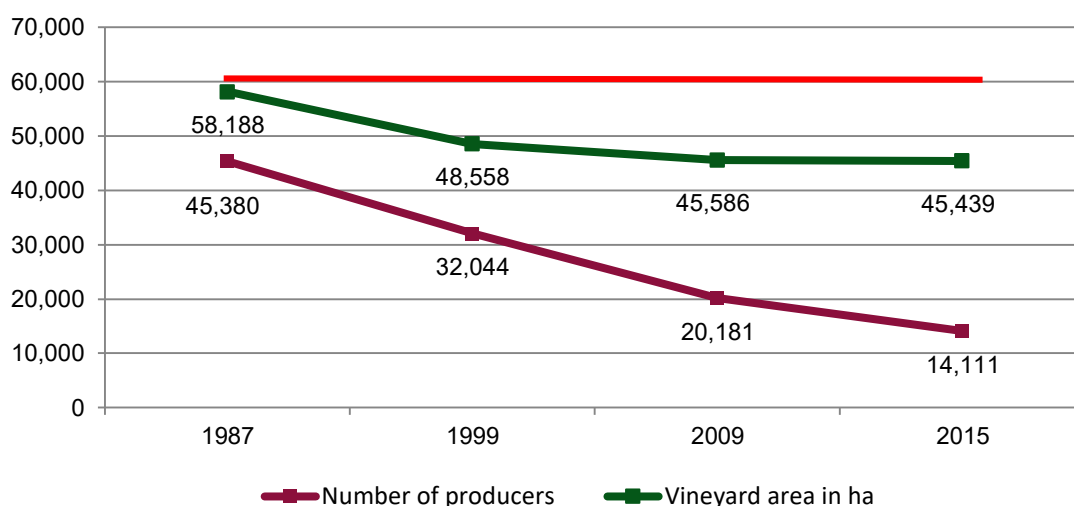


Figure 16: Evolution of the number of producers in relation to vineyard area⁴⁰

The 2015 Survey of Area under Vine reports a total of 45,439 ha under vine in Austria (with a possible upper limit of 60,000 ha, as shown by the red line on the graph). This represents a drop of 22% since 1987. The number of producers reported in 2015 was 14,111, which corresponds to a decrease of 69% since 1987. As illustrated in Figure 16, planted vineyards are being managed by a continually falling number of winegrowers, who, consequently, are managing larger areas. The average size of winery has grown from 1.28 ha in 1987 to 3.22 ha in 2015. This evolution shows a clear trend towards larger wineries, which is accompanied by a decline in small producers.

2.5.2 Bottler capacity

The number of bottlers of Qualitätswein has decreased to around 4,200 businesses, compared to almost 6,500 in 2009. Conversely, the number of businesses with the capacity to bottle over 30,000 litres has increased to 1,839, compared to around 970 in 2009. These bottlers are at the forefront of the Austrian wine industry, and all of them work in close cooperation with the AWMB.

	Producers 2009	Producers 2019	Producers +/-
over 1 million litres	19	28	9
500.001 - 1 million litres	18	39	21
100.001 - 500.000 litres	159	414	255
50.001 - 100.000 litres	340	674	334
30.001 - 50.000 litres	440	684	244
10.001 - 30.000 litres	1,653	1,493	-160
5.001 - 10.000 litres	3,852	878	-2,974

Figure 17: Number of bottlers (in litres of bottled wine) 2009 vs. 2019⁴¹

⁴⁰ AWMB, based on Statistics Austria Survey of Area under Vine from 1987, 1999, 2009 and 2015

⁴¹ Source: Bundeskellereinspektion: 2009 and 2019 inventory reports; sales data from businesses with reporting requirements

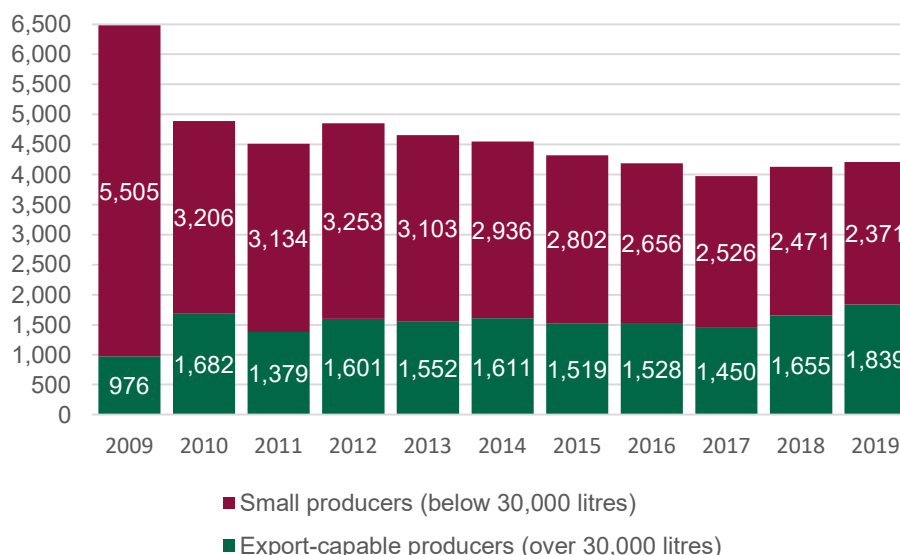


Figure 18: Number of bottlers above and below 30,000 litres⁴²

A comparison of the 2009–2019 sales data for businesses subject to reporting requirements shows that the number of export-capable producers (with sales of over 30,000 litres) has grown very sharply since 2009 (from 976 to currently 1,839 businesses), whilst the number of small producers (especially those with sales volumes below 5,000 litres) has more than halved.

Of course, annual influences and harvest volumes play a role in this (e.g. the number of businesses was particularly small in 2011 as a result of the low 2010 harvest). However, the overall picture clearly shows the breakneck pace of structural change in the Austrian wine industry. The consequence is ever-increasing levels of predatory competition. In order to ensure that we secure our competitive ability and growth over the long term, it is of vital importance for the AWMB, working in partnership with the wine industry, to enter as many export markets as possible.

⁴² Source: Bundeskellereiinspektion: AWMB based on inventory reports 2009-2019

2.6. Qualitätswein – an overview of federal inspection numbers for 2019⁴³

Overview of federal inspection numbers	
Total volume in litres	192,454,996
Number of issued federal inspection numbers	34,005
Number of applications	38,244
Number of producers who submitted an application	4,293
Tariff cost for evaluation in euros	2,557,567
Other costs for evaluation in euros	1,452,055

Figure 19: Overview of federal inspection numbers 2019

	Total volume submitted	Issued federal inspection numbers	Total volume in litres	Refusals in litres
DAC red	2,156,555	397	2,062,795	93,760
DAC white	30,055,737	5,566	26,799,349	3,256,388
DAC rosé	613,405	160	607,205	6,200
Total	32,825,697	6,123	29,469,349	3,356,348

Figure 20: Overview of DAC submissions

Winegrowing region	DAC volume in litres
Niederösterreich	
Carnuntum DAC	242,700
Kamptal DAC	6,200,193
Kremstal DAC	3,497,411
Traisental DAC	1,067,237
Weinviertel DAC	7,202,786
Burgenland	
Eisenberg DAC	211,605
Leithaberg DAC	268,070
Mittelburgenland DAC	579,185
Neusiedlersee DAC	987,305
Rosalia DAC	76,580
Steiermark	
Südsteiermark DAC	5,900,475
Vulkanland Steiermark DAC	1,516,306
Weststeiermark DAC	791,395
Wien	
Wiener Gemischter Satz DAC	928,101

Figure 21: Volume of DAC wines by winegrowing region

Winegrowing region	Total volume of quality wines in litres
Niederösterreich	89,610,284
Burgenland	45,088,766
Steiermark	8,775,474
Wien	1,919,925

Figure 22: Volume of Qualitätswein by generic origin

⁴³ Austrian Ministry of Agriculture, Regions and Tourism (BMLRT), federal inspection numbers 2019, from 1 January 2019 to 31 December 2019