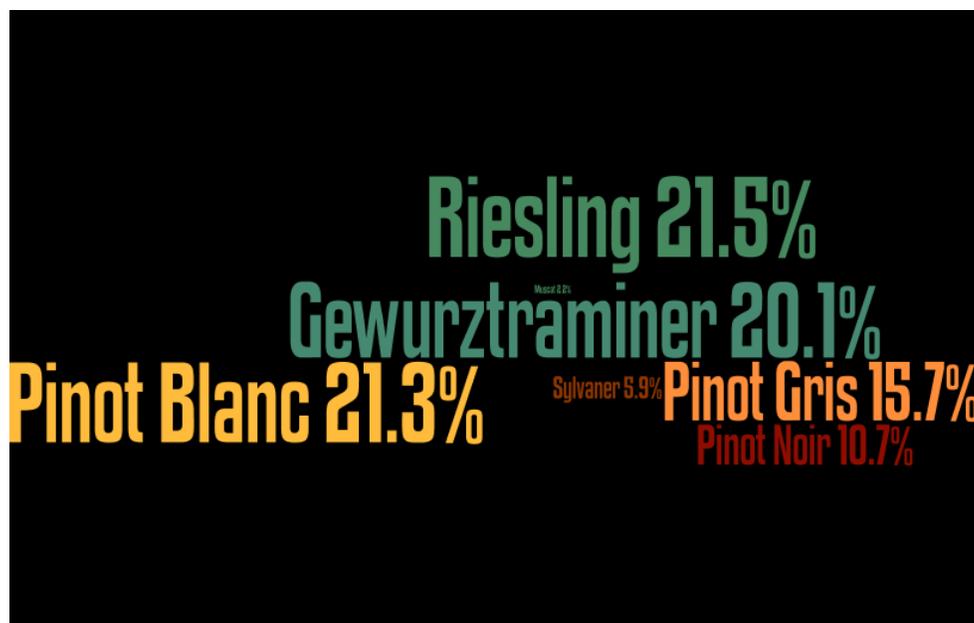


ALSACE WINE PRODUCTION BY NUMBERS

A report compiled by the Back In Alsace Project¹ from data released in April 2018 by the Conseil Interprofessionnel des Vins d'Alsace (CIVA²). Thanks to the CIVA for making this information available.



This is for that rare breed of people that love both Alsace wine and statistics. The kinds of people that know the Peter Greenaway film, *Drowning by Numbers*. The kinds of people that know the Radiohead track, *The Numbers*. Listen to that track with a glass of something white, cool and chilled from Alsace when you read this piece.

The most recent set of annual statistics on Alsace wine production is from 2017. The numbers are compiled each year by the CIVA and are used by various official bodies for reporting purposes. We present the big picture overview to encourage an understanding of the fundamentals around grape varieties, volumes and trends. That's all this is - as the real quality drivers that count, come from the individual producers who put the wine into the bottle.

We are not trying to tell a flowing story and the idea is to jump around the various charts and cherry pick the information of interest.

Two areas to be reported on at a later date will cover the significant growth in the area of organic and biodynamic vineyards in Alsace and also how the size of vineyard holdings has changed during the last period.

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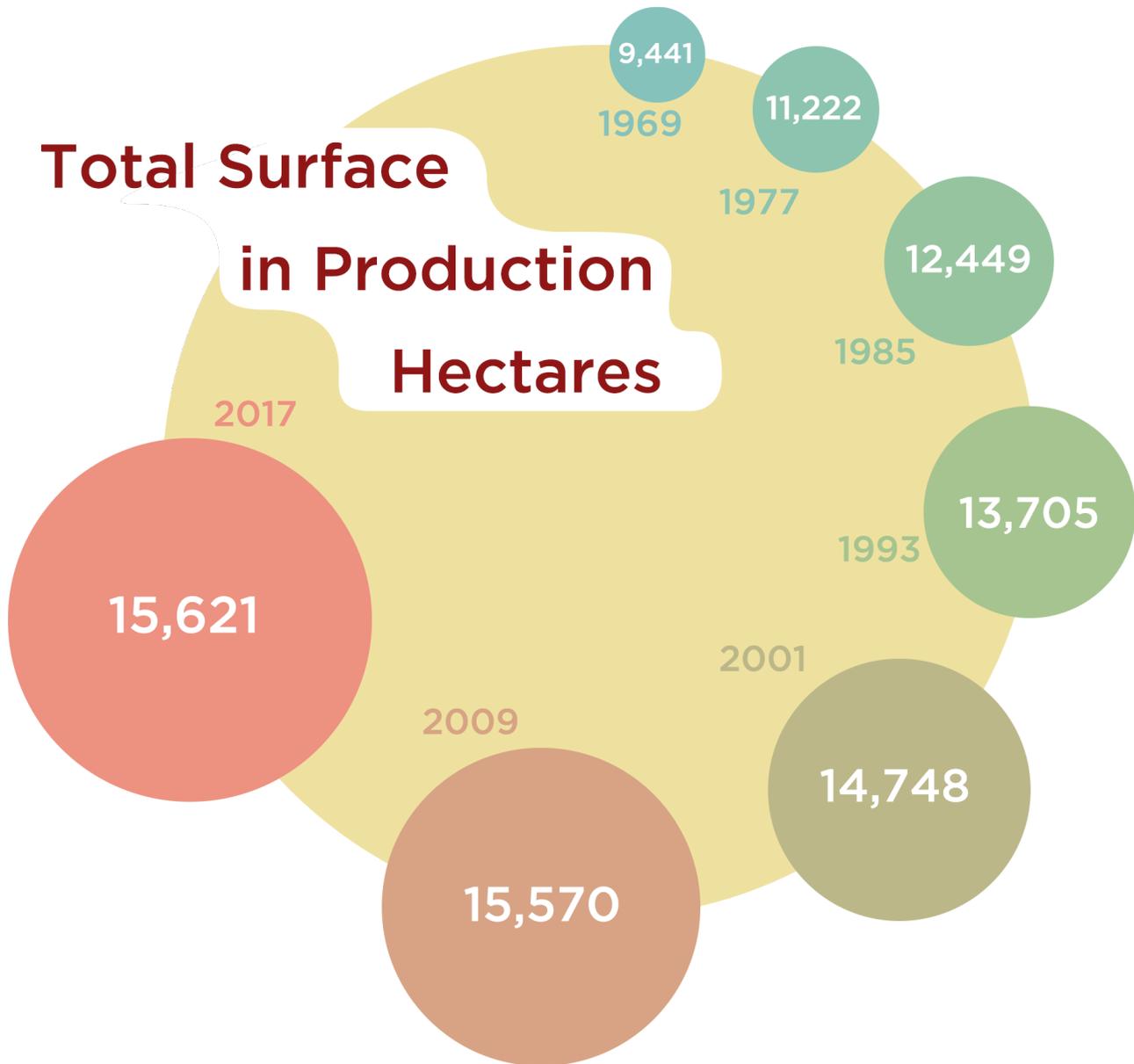
² CIVA - 12, Avenue de la Foire aux Vins, 68000 Colmar, France

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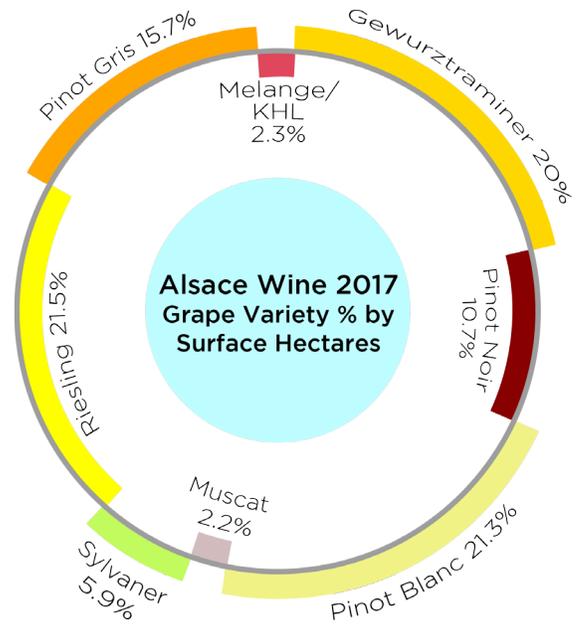
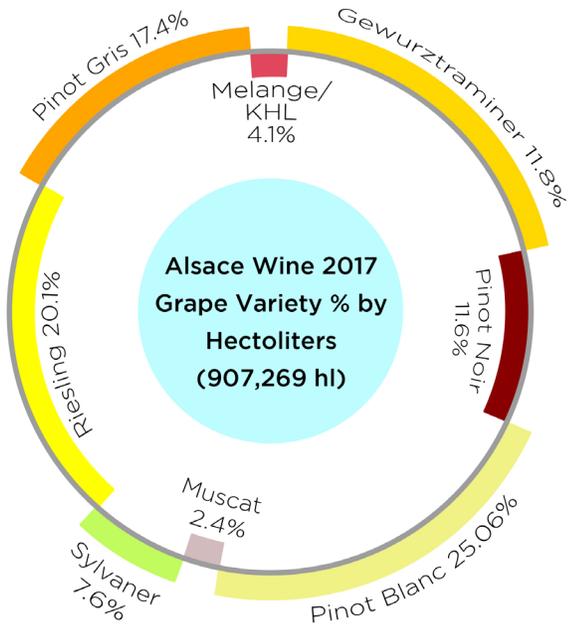
AREA PLANTED, VARIETIES AND YIELDS

The first chart shows the increase in the Alsace vineyard area between 1969 and 2017. There are 53 appellations in Alsace: AOC Alsace, AOC Crémant Alsace, and 51 named Alsace Grand Crus. In 2017 the surface area was split between them as follows; AOC Alsace 70.4%, AOC Crémant 23.3% and AOC Grand Cru 6.3%.

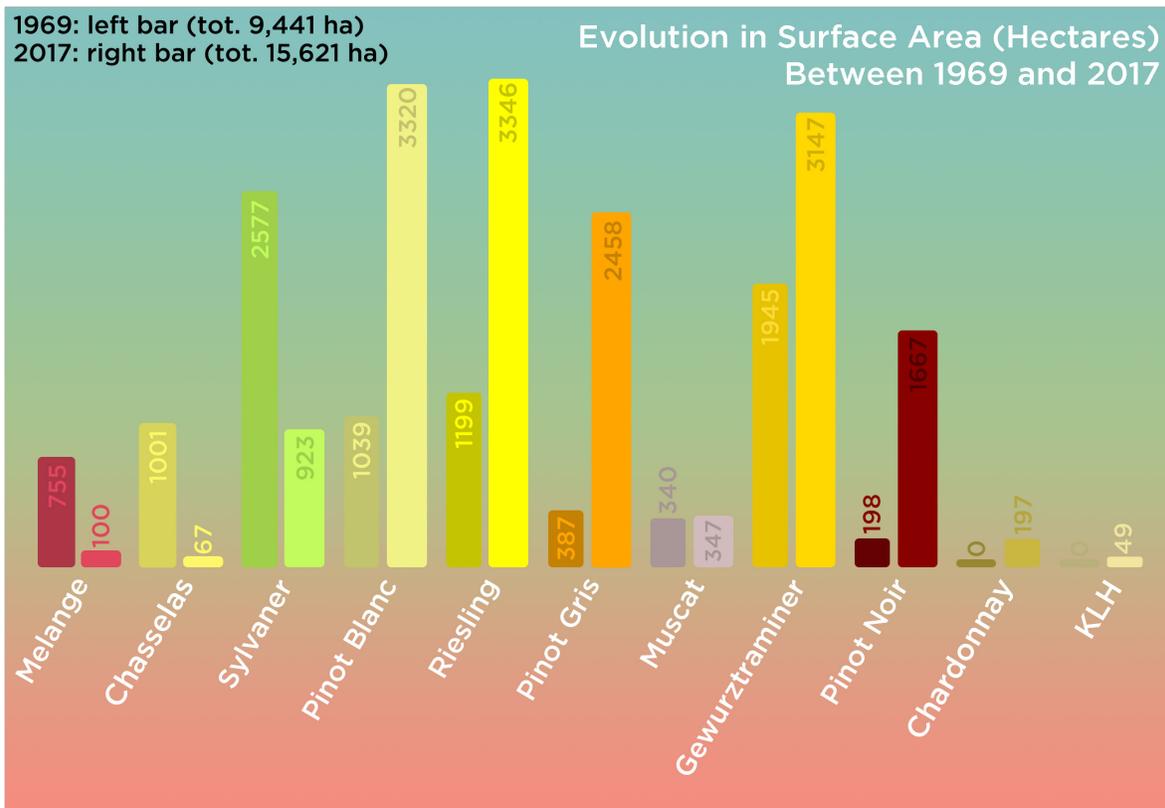


The next two charts show the 2017 data for total yield and the surface area planted by each variety. The vast majority of the Alsace wines come with a varietal stamp on the label.

Twelve grape varieties are officially grown in Alsace. The four “noble” Grand Cru varieties: Riesling, Gewurztraminer, Pinot Gris and Muscat (two varieties). Pinot Blanc (including Auxerrois) is the workhorse variety, which is heavily used for cremant production. Pinot Noir, which is the only “red wine” variety in Alsace and also used for rosé cremant production. Sylvaner, which has seen a big jump in wine quality as the area planted, has significantly reduced over the years. Then the three small footprint varieties: Chasselas, Chardonnay (cremant production) and Klevener de Heiligenstein (Savagnin Rose).

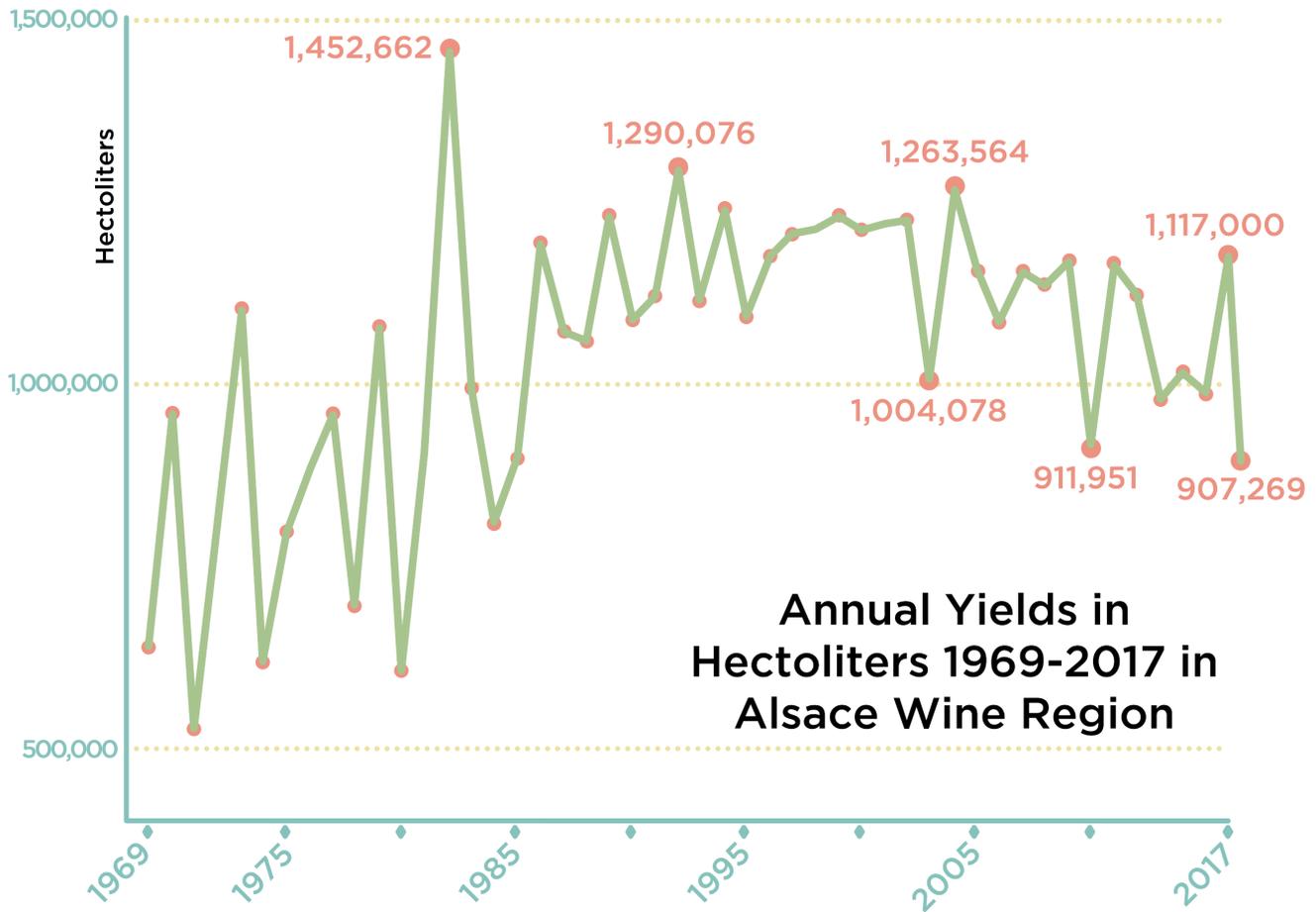


The next chart shows the change in the surface areas planted by variety between 1969 and 2017. With big drops in the Sylvaner and Chasselas areas and big jumps in Pinot Blanc, Riesling, Pinot Gris, Gewurztraminer and Pinot Noir areas.



THE TRENDS IN ANNUAL YIELD

Total annual yields in hectolitres are shown in the next chart. Much of the fluctuation is dependent on annual vintage weather conditions. To note in particular are the three recent low vintages of 2013, 2014 and 2015. These were followed by what was optimistically hoped for as a “standard” vintage yield in 2016. To set you straight 1 million hectolitres ends up as approximately 133 million bottles. The 2017 vintage was again a big disappointment in terms of quantity. The late April frosts took their toll. Total production was down 22.9% from 2016 and down 13.9% from the average 2012-2016 yield.



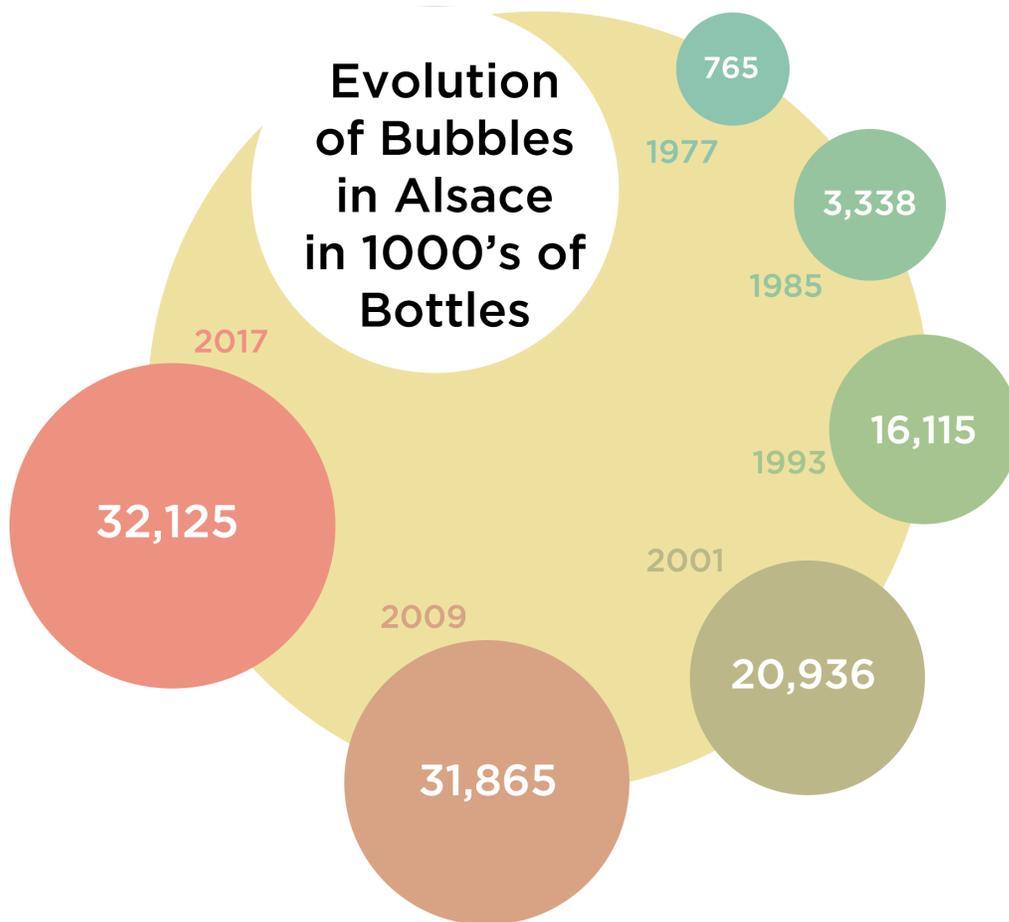
EXPORT

Approximately 25% of Alsace wine production goes to export. The next chart shows how this is split as a percentage by country against total exports. The main importing countries are the Alsace neighbours, plus the Nordic countries (in terms of per capita), where Alsace wine is a fabulous food match. The U.S.A is becoming more important for export as general wine appreciation develops. Somewhere in the region of 30 million bottles are exported from Alsace each year.



CREMANT

Production of Alsace crémant has seen a spectacular development since the early 1980's. This is driven by a strong demand in France, which accounts for 80% of crémant sales. Of the 20% that goes to export, the U.S. comes in as a strong third behind Belgium and Germany. In round figures from 2017, of the 33 million bottles of crémant produced, just south of 7 million are exported.



LATE HARVEST WINES

Alsace wine also has two “mentions” which are in the exceptional category. The Alsace sub continental climate has the potential of a long sunny autumn that can allow the development of late harvest, Vendanges Tardives wines. If this comes with misty mornings, then botrytis noble rot can set in and Selection Grains Nobles may be produced. Both these “mentions“ allow a superb concentration in the wines that balances with the varietal characteristics. The production is strictly controlled and wines must go through a tasting panel before being awarded the designations. Minimum levels of residual sugar and alcohol are set and can be adjusted on an annual basis with the intention of tightly controlling quality. These wines, especially the SGN wines, can significantly increase in their complexity with long bottle ageing.

Check out the chart and it is obvious that annual vintage conditions play a massive role in the quantity of these wines that are produced. There are bad years, there are good years and there are years for exceptional quality. The good news is that 2017 had almost perfect autumn weather conditions for high quality late harvest wines. This is something we will be tracking with great pleasure during the next 30 years.

