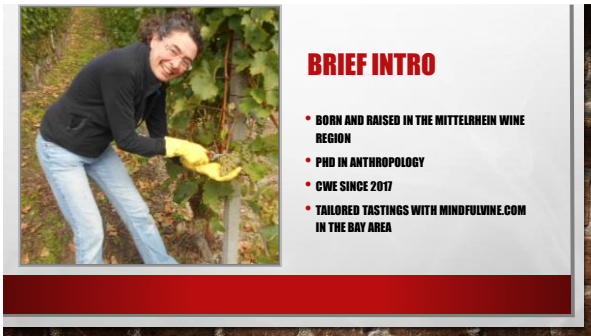




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4



- 4th largest wine producer in the EU
- Germany imports four times as much wine as it produces
- per capita consumption is 27 liters [or 7 gallons]/person

5

Wine Consumption per Capita (2021).

	liters		liters		liters
Portugal	51.9	Netherlands	26.1	Canada	13.3
France	46.9	Belgium	26.0	USA	12.2
Italy	46.0	Czech Rep.	25.6	South Africa	9.5
Switzerland	35.3	Sweden	25.5	Russia	8.8
Austria	30.6	Romania	24.6	Japan	3.0
Australia	28.7	Argentina	24.5	Brazil	2.4
Germany	27.5	Greece	24.5	China	0.9
Spain	26.2	UK	24.0		

Source: OIV State of the World Wine Sector 2022

6

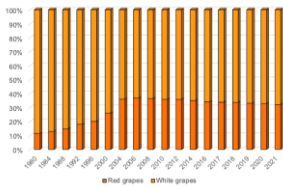
GERMAN WINE IN NUMBERS

- average household purchases
 - 46% red wine
 - 44% white wine
 - 10% rosé
- over 100 varieties are permitted, but 5 white and 5 red varieties make up 77% and 78% of all plantings, respectively

7

Red and White Vineyard Surface Historically.

Top Whites: Riesling, Müller-Thurgau, Grauburgunder, Weissburgunder, and ...



Source: German Wine Institute, Facts and Figures 2022

8

Major Wine Export Destinations (2021).

Country	Value (1000 €)	Volume (hl)	% +/- value 20/21	% +/- vol. 20/21
USA	65 000	171 000	+ 23.9	+ 10.7
Norway	34 000	88 000	+ 3.8	- 1.9
Netherlands	28 000	146 000	+ 19.7	+ 25.1
UK	23 000	89 000	+ 62.4	+ 16.7
Poland	22 000	114 000	+ 115.1	+ 101.8
China	19 000	36 000	+ 14.7	+ 23.1
Sweden	17 000	74 000	+ 18.9	+ 15.8
Canada	14 000	36 000	+ 19.6	+ 4.2
Finland	13 000	46 000	+ 12.9	+ 2.8
Japan	12 000	27 000	+ 20.7	+ 14.5
Total	357 000	1 212 000	+ 28.8	+ 27.2

Source: German Wine Institute Facts and Figures, 2022

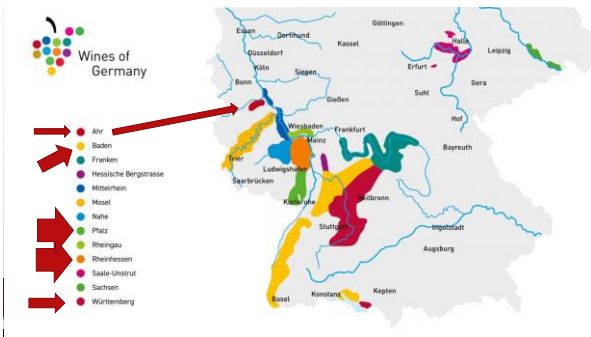
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10



11



12

WÜRTTEMBERG



- 11,400ha along the Neckar river; Ems & Rems tributaries
- Black Forest and Swabian Jura protect vines
- lime, clay, marl, loess etc. soils
- 80% of production by 50 cooperatives
- most wine drunk locally

19

BADEN



- 15,800ha
- along 400km on right bank of Rhine river
- warmest wine region
- from lime to granite to volcanic soils
- 85% of wine produced by ~100 cooperatives
- increasingly exported

20

PFALZ



- 23,700 ha vineyards mostly in the plains along left bank of Rhine
- fertile, sandy alluvial soils predominate
- bulk wine production, but aiming to upgrade image
- largest German red wine region by volume

21

RHEINHESSEN



- 26,900ha of rolling hills left bank/south of Rhine
- protected by Taunus mountains
- lime, loam, loess, also red slate & clay
- Germany's largest region
- from Liebfraumilch to VDP estate wines

22

TOP RED GRAPE VARIETIES



23

Major Red Grape-Varieties in Germany (ha).

Grape-variety	2000	2021	Change %
Spätburgunder	9 255	11 602	+ 25.4
Dornfelder	4 372	7 109	+ 62.6
Portugieser	5 026	2 432	- 51.6
Trollinger	2 593	1 992	- 23.2
Lemberger	1 196	1 940	+ 62.2
Schwarzriesling	2 405	1 756	- 27.0
Regent	449	1 671	+ 272.1
Total red	27 200	33 283	+ 22.4

Source: German Wine Institute, Facts and Figures 2022.

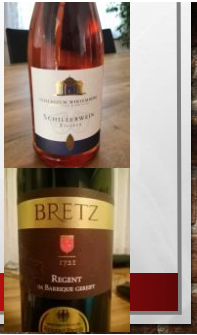
24

Schwarzriesling

- ability to bud and ripen more reliably than Pinot Noir
- retains acidity as it ripens
- widely used in Champagne and Sekt production
- in Württemberg, Schwarzriesling is used for a rosé known as *Schillerwein*: light pink color, smokey notes

Regent

- pest resistant grape, created 1967, permitted 1996
- Silvaner x Müller-Thurgau x Chambourcin
- deep red color, good tannin structure, aromas of cherries and plums
- good as easy-drinking fruity rosé or red wine OR aged in wood



25

SPÄTBURGUNDER

- 11,500ha, with 5,000 ha in Baden alone, but grown in all regions [**Rheinhessen** 6%]
- 12% of German vineyard total
- traditional German Spätburgunder is light in color, medium in alcohol, with good acidity
- to reach global markets, German winemakers are producing bigger, more deeply colored wines, labeled Pinot Noir



26

DORNFELDER

- 6,800ha total, with **Pfalz** and Rheinhessen ~3,000ha each
- 7% of German vineyard total
- a cross, in 1955, of two previously crossed varieties, it was initially a blending grape to add color
- capable of high yields; good disease resistance
- juicy, fruit-forward, and good acidity



27

PORTUGIESER

- 2,300ha total, with with ~1,000 each in Pfalz and Rheinhessen
- 3% of Germany's total vineyard area
- originally from Danube, not Portugal
- easy-drinking , fruity red and rosé wines
- vineyard area continues to decline



28

TROLLINGER

- 2,000ha across Germany, almost all of it in **Württemberg**
- 2% of Germany's total vineyard area
- needs a long time to ripen, but retains high acidity
- appreciated for reliable, high yields
- KNOWN AS: Schiava or Vernatsch in Alto Adige where grape is thought to originate




29

LEMBERGER

- 2,000ha in Germany; esp. Württemberg & Baden
- 2% of total vineyard area
- versatile grape: from light and fruity to full-bodied and barrel-age-worthy wines
- retains high acidity, and can be used for Sekt
- can withstand cold weather, ripens late
- ALSO KNOWN AS: Blaufränkisch (Austria) or Kékfrankos (Hungary) or Frankovka (Slovakia)



30



Kiona
VINEYARDS

RED MOUNTAIN LEMBERGER
ESTATE BOTTLED

Kiona Vineyards & Winery
planted the state's first
commercial Lemberger
vineyard in the 1970s. The
grape's biggest advocate then:
Walter Clore

Other WA estates that make it:
Two Mountain Winery
Holmes Harbor Cellars
Thurston Wolfe Winery

But vineyard acreage has
been declining (~250->60).

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TASTE ALONG

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TASTE ALONG: SPÄTBURGUNDER

2020 Dr. Heidemann's Bergweiler Pinot Noir, Rheinhessen - 12% alc. **20\$**

- 100% Pinot Noir
- COLOR: pale red
- NOSE: red cherry, strawberry, dried leaves, earthiness, black pepper
- PALATE: very refreshing acidity, red fruit, dried leaves, earth; no sign of mushroom, game or leather; an affordable, light, food-friendly PN



33

TASTE ALONG: DORNFELDER 17\$

2020 Gerd Anselmann Dornfelder, Pfalz – 11.5% alc.

- 100% Dornfelder
- COLOR: medium red
- NOSE: very fruity and floral, low on tannins and oak influence with good acidity and a touch of RS
- PALATE: red and black fruit, smooth mouthfeel due to low tannins, overall juicy and fun to drink



34

TASTE ALONG: LEMBERGER 19\$

2017 Burg Ravensburg Sulzfeld Blaufränkisch, VDP Ortswein, Baden – 12.5%

- 100% Blaufränkisch, aka Lemberger
- COLOR: medium red
- NOSE: ripe and dried black cherry, blackberry, dark chocolate, violet, vanilla, toast, smoke, dried herbs, black pepper
- PALATE: freshness, acidity, ripe tannins complementing the ripe dark fruit, chocolate, and oak notes; with spicy, smoky finish



35

TASTE ALONG: TROLLINGER 34\$

2022 Schmittmann Trollinger Alte Reben, VDP Grosse Lage, Württemberg – 11%

- 100% Trollinger
- COLOR: pale red
- NOSE: tart red cherry, red currant, pomegranate, hibiscus, black pepper, earthy, forest floor, band aid
- PALATE: high acidity, low alcohol, medium tannins, fresh, tart red fruits with spicy-toasty notes



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TASTE ALONG: "CUVÉE ROUGE"

2018 Dr. Bürklin-Wolf Cuvée Rouge, Pfalz – 13%

20\$

- Unique blend of Pinot Noir, Dornfelder, and Merlot
- COLOR: deep red with purple tinge
- NOSE: blackberry, red and black cherry, plum, chocolate, dried leaves, tobacco, leather, toast, smoke, cloves
- PALATE: bright acidity, soft tannins, ripe to cooked blackberries and cherries, smoke, toast, baking spices, round and smooth, nice finish



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SOURCES

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