ASOCIACIÓN NACIONAL
DE INGENIEROS AGRÓNOMOS
ENÓLOGOS · CHILE

Wines of Chile

VINTAGE 2024

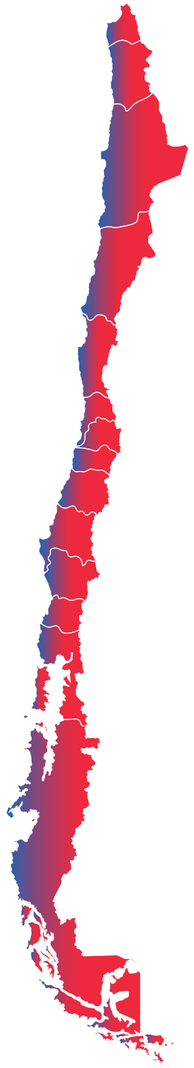
EXECUTIVE REPORT

CHILE

CHILE

NUMBER ONE WINE EXPORTER

OF THE NEW WORLD



CHILE

SOUTH AMERICA

Chile is currently the first wine exporter in the new world and the fourth largest exporter of wines in the world (ODEPA, 2023), being recognized for its geographical richness, reflected in the quality and diversity of its grape varieties.

ANIAE CHILE

Wines of Chile

VINTAGE
2024 CHILE

GENERAL BACKGROUND

SURVEY UNIVERSE

The results of the survey of **wine producers** represent **301 million liters produced in 2024**, which corresponds to **27% of the total** national production and **33%** of the D.O. wines with respect to wine production 2023 (SAG, 2023).

The producers represented **12.227 hectares,** which represents **9% of the total** national vineyards. A total of **188 production centers from different wine companies** were part of the survey.

The vintage survey was divided between grape growers and wine producers:

1. Grape Growers Survey_____93 surveys
2. Wine Producers Survey _____95 surveys

SURVEYS BY WINEGROWING REGION

GRAPE PRODUCERS

Survey Source:

GRAPE PRODUCERS

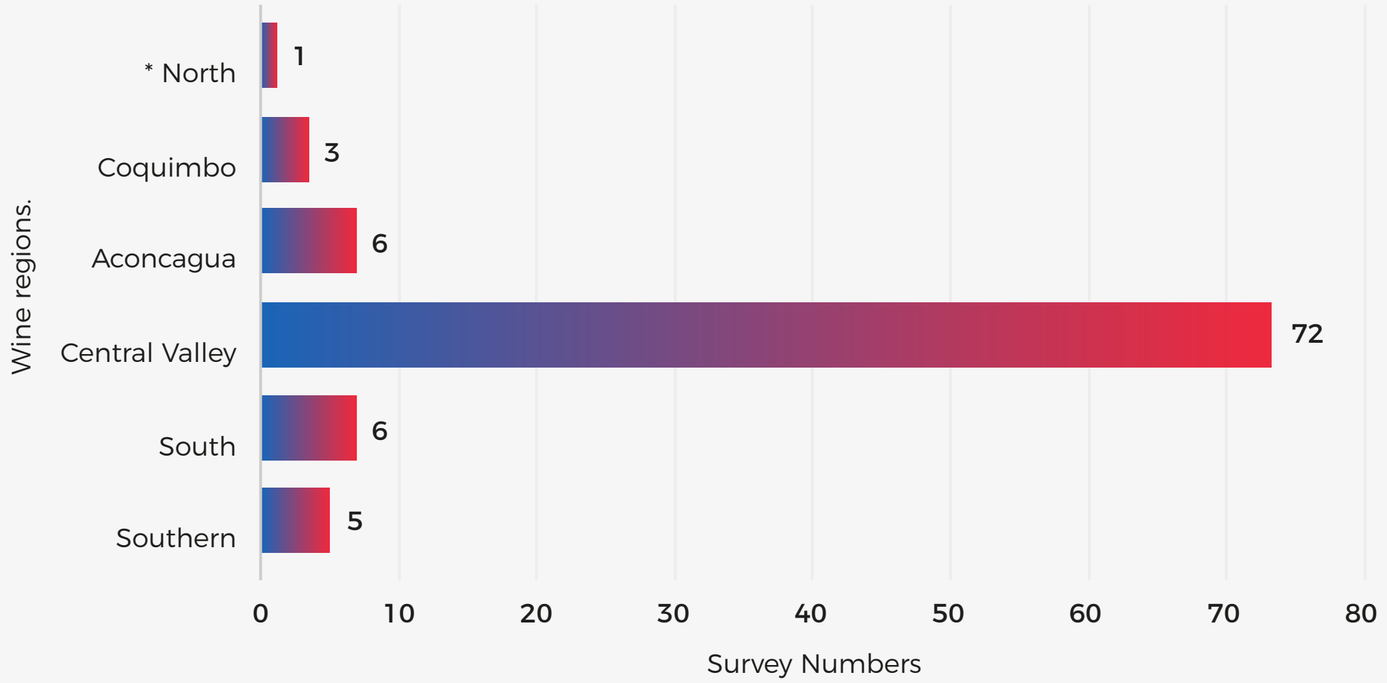


Figure 1. Number of surveys by wine region.
Source: Vintage Survey 2024, Grape Growers.
*The North region corresponds to the region of Arica and Parinacota.

SURVEYS BY WINEGROWING REGION

WINE PRODUCERS

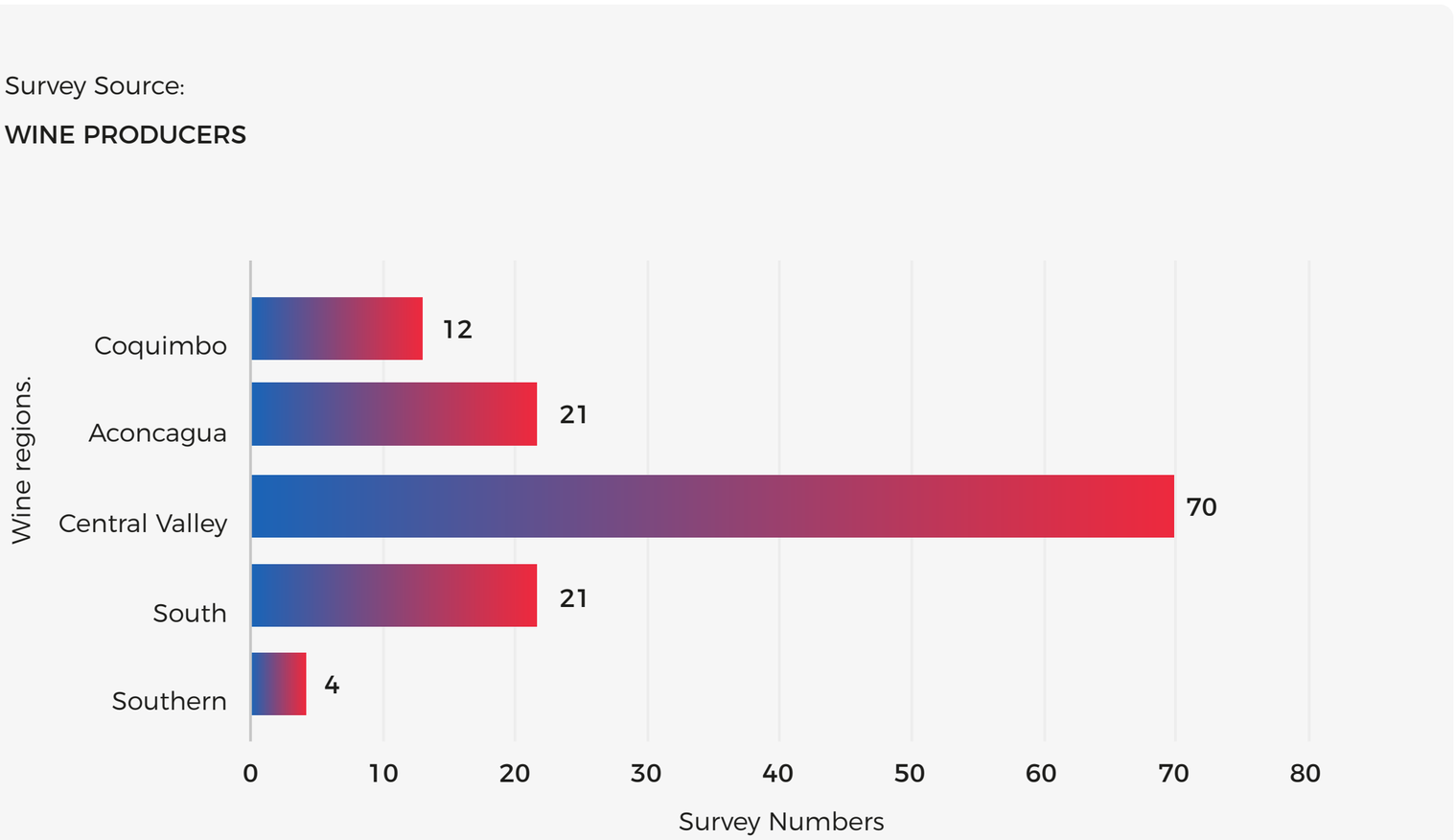


Figure 2. Number of surveys by wine region.
Source: Vintage Survey 2024, Wine Producers.
*Surveys may represent more than one wine region or valley.

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Wines of Chile

KEY ASPECTS
OF THE WINEGROWING SEASON

CHILE

VINTAGE 2024

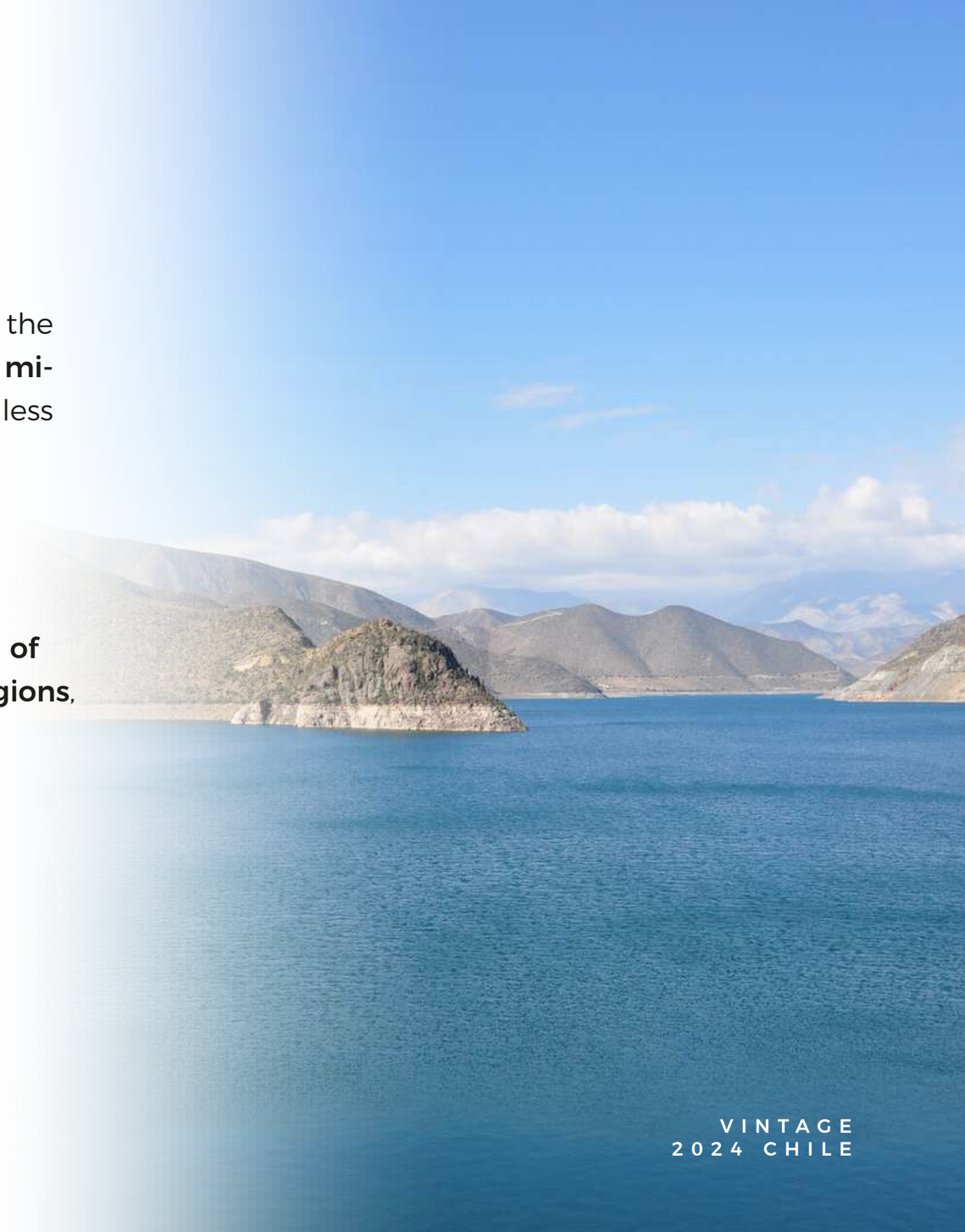
KEY ASPECTS

RESERVOIRS

In December 2023, **7.147 million m³** of water was stored, 31% more than the 5.447 million m³ stored in December 2022, but **the historical average of 7.272 million m³** is slightly lower. There are also 7 reservoirs whose current volume is less than 20% of their capacity, mainly in the Coquimbo region.

ACCUMULATED RAINFALL

The start of the 2023-2024 season began with a cool spring, with a **good level of water in the soil in the vineyards, except for the Atacama and Coquimbo regions**, which have **high deficits in reservoirs and rivers.**



ANIAE CHILE

Wines of Chile

RAINFALL IN DECEMBER 2023

COMPARED TO THE HISTORICAL AVERAGE

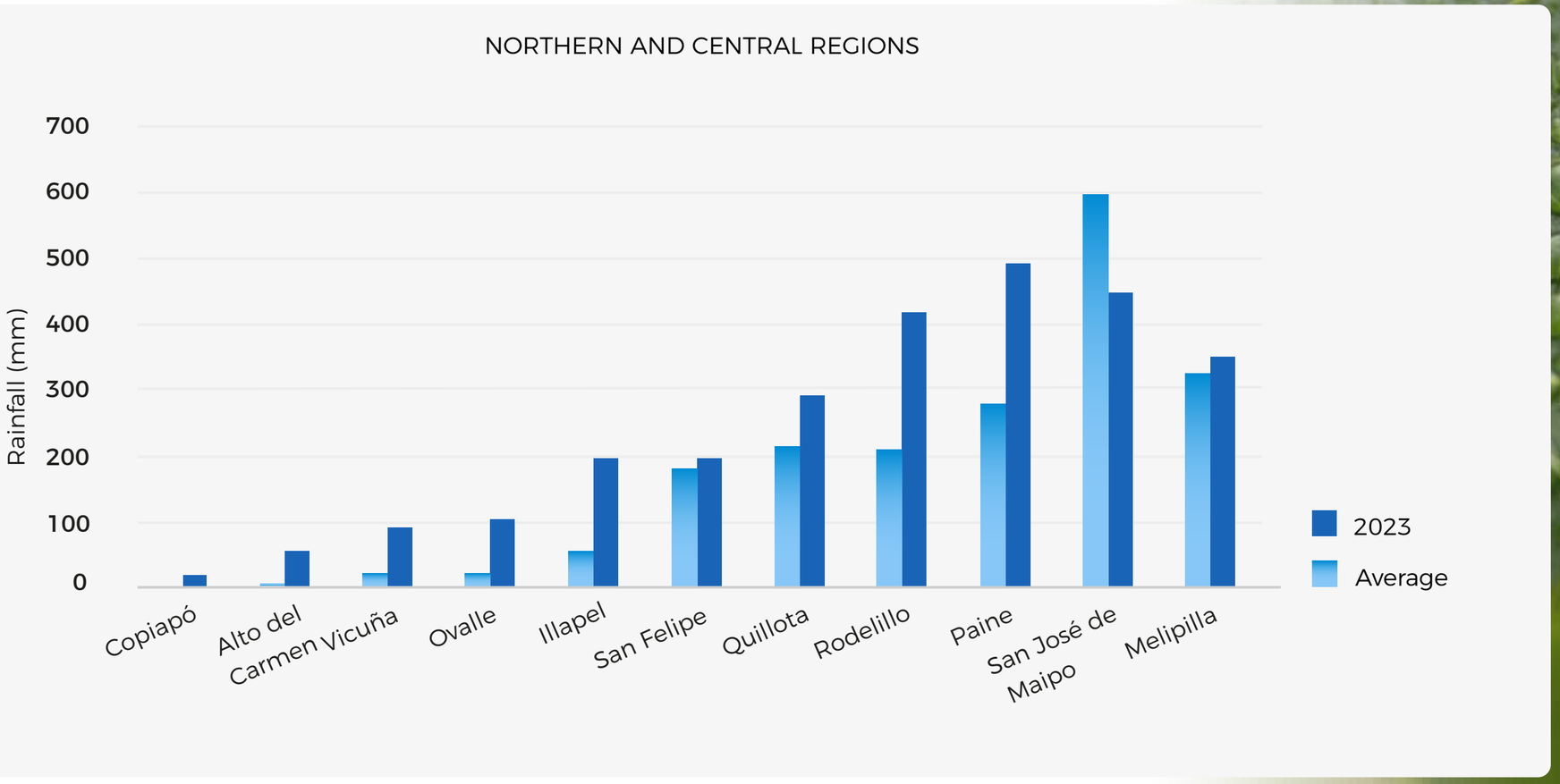


Figure 3. Rainfall in valleys of the Northern and Center regions (mm) by locality. Cumulative volume of water in 2023 with respect to the average (2012-2022). Source: DGA, Pre-harvest Report ODEPA, 2024.

RAINFALL IN DECEMBER 2023

COMPARED TO THE HISTORICAL AVERAGE

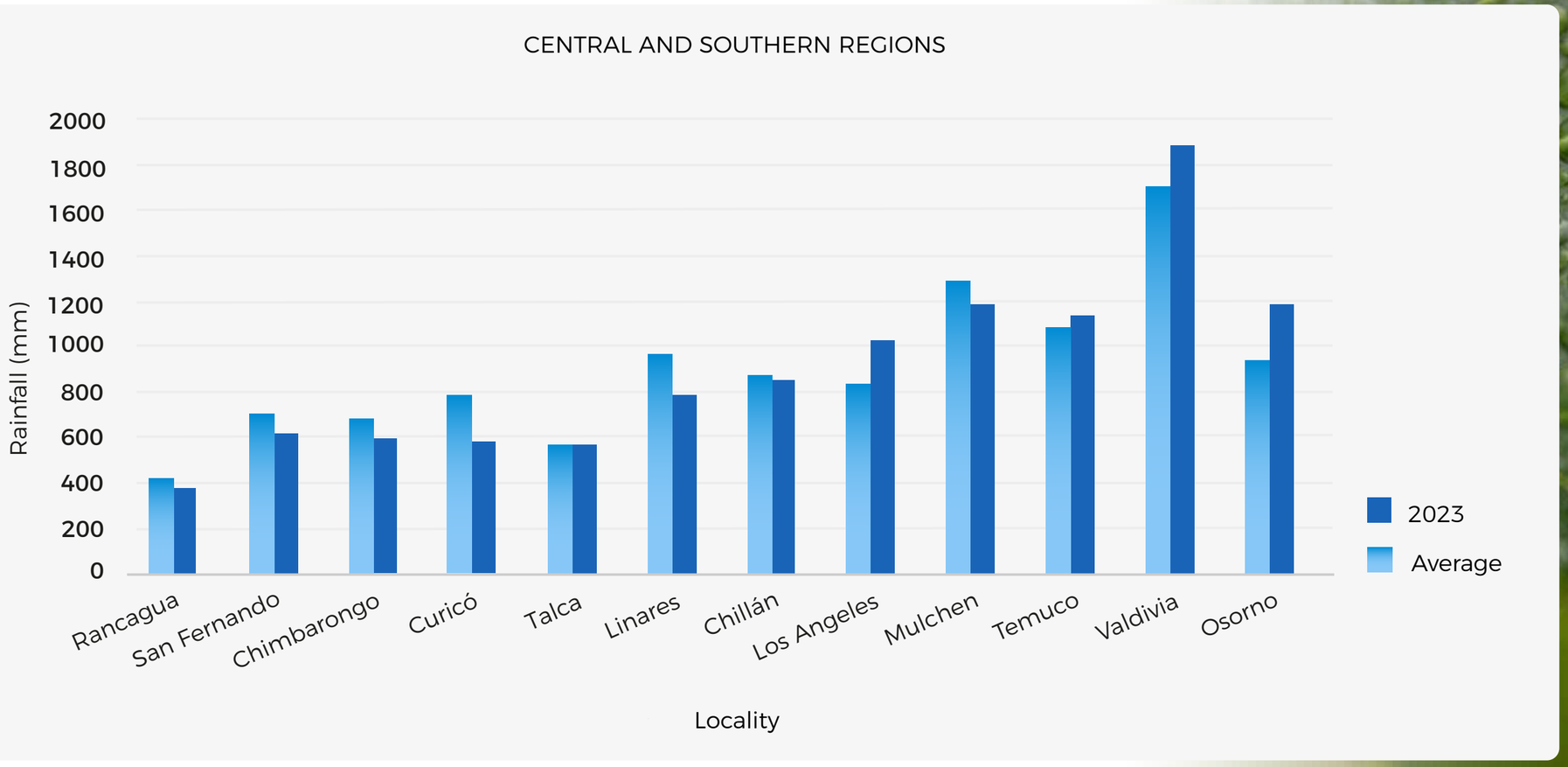
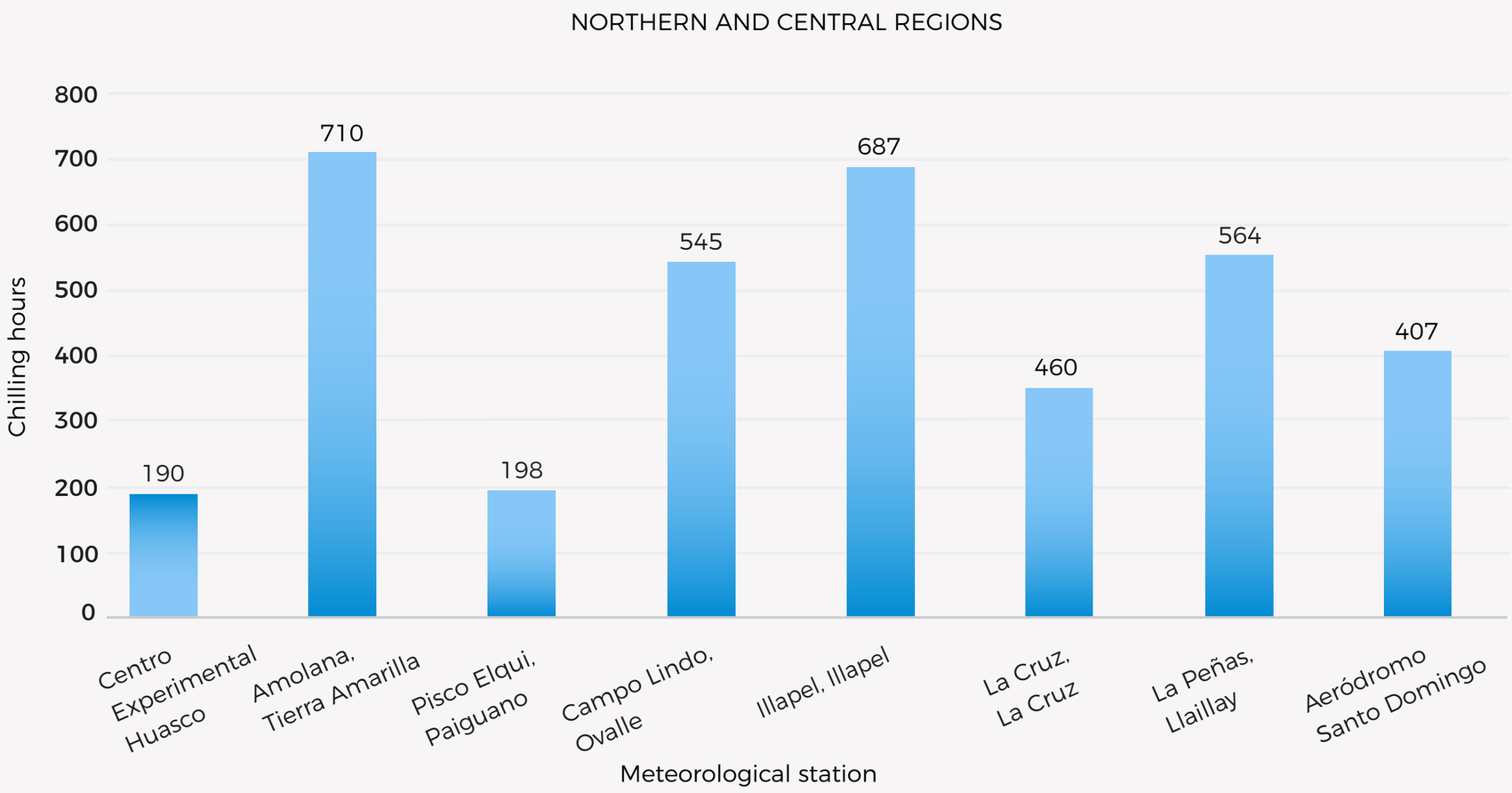


Figure 4. Rainfall in the valleys of the Central and Southern regions (mm) by locality. Cumulative volume year 2023 with respect to the average (2012-2022).
Source: DGA, ODEPA Pre-harvest report, 2024.

ACCUMULATION OF CHILLING HOURS

SEASON 2023-2024



(Base 7,2˚C)
The accumulation of Chilling Hours (CH) for the 2023 - 2024 season was heterogeneous by location, reaching very low levels in Huasco and Paihuano, and good levels in Tierra Amarilla and Illapel. In the Valparaíso region, the levels were sufficient (Figure 5).

Figure 5. Accumulation of Chilling Hours (base 7,2˚C) for the 2023-2024 season at meteorological stations in the Northern and Central regions. Source: INIA Agrometeorological Network.

ACCUMULATION OF CHILLING HOURS
2023-2024 SEASON

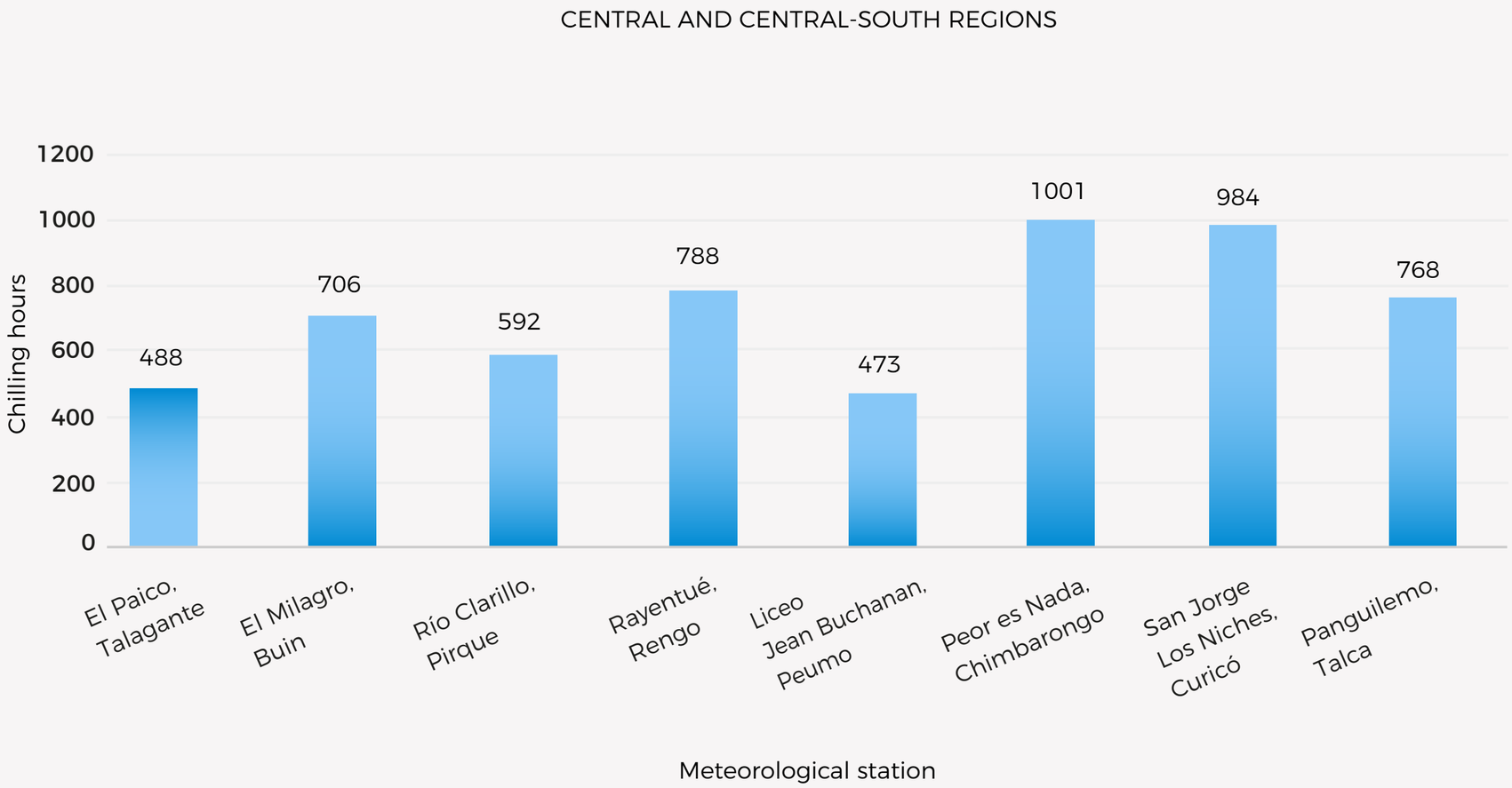


Figure 6. Accumulation of Chilling Hours (base 7,2˚C), for the 2023-2024 season at meteorological stations in the Central and Central-South regions. Source: INIA Agrometeorological Network.

From the Metropolitan region to Talca in the Maule region, there was a good accumulation of Chilling Hours during the season (Figure 6).

ACCUMULATION OF CHILLING HOURS
2023-2024 SEASON

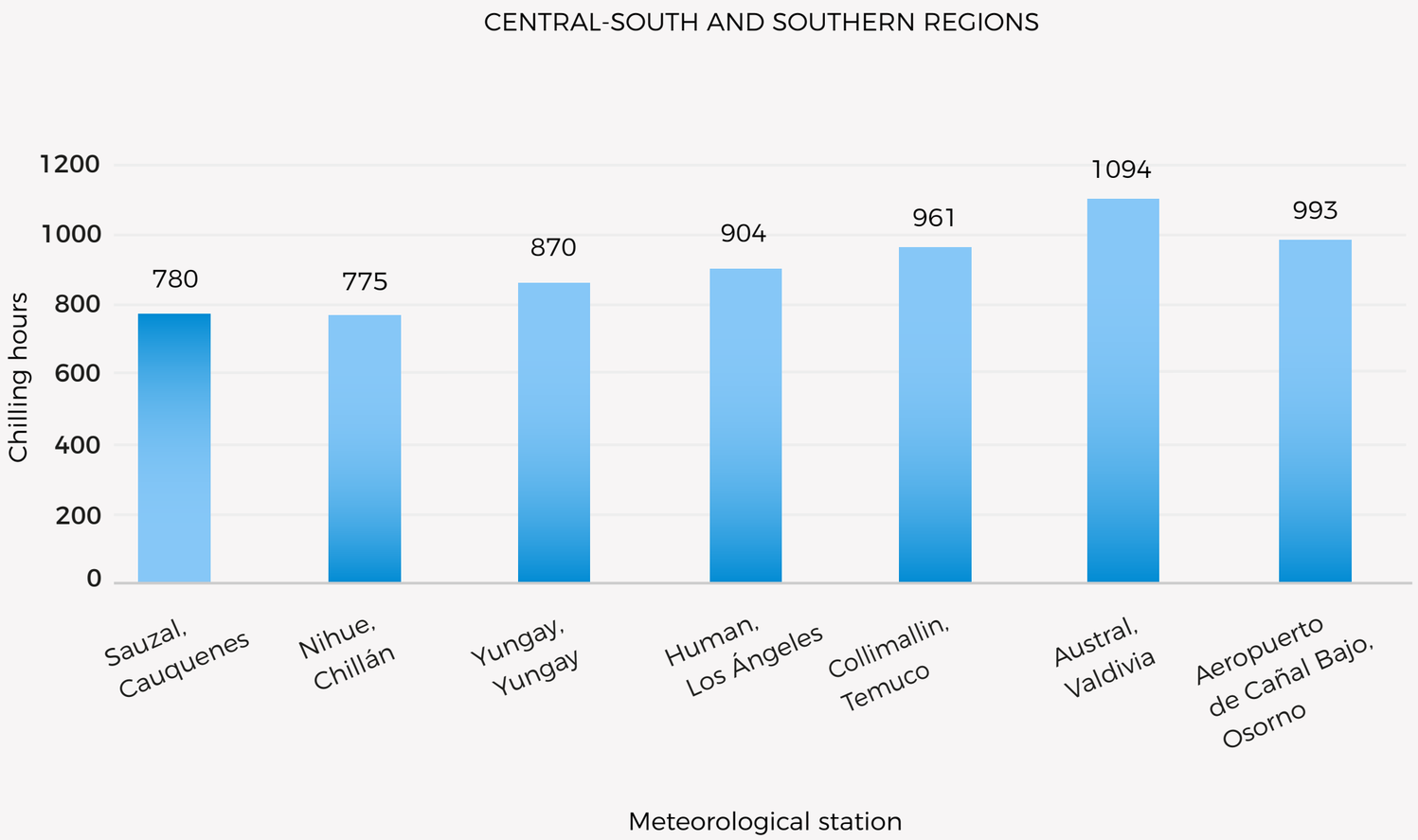


Figure 7. Accumulation of Chilling Hours (base 7,2˚C) for the 2023-2024 season at meteorological stations in the Central-South and Southern regions. Source: INIA Agrometeorological Network.

Between Cauquenes and Osorno, the accumulation of Chilling Hours was above 750 CH (Figure 7).

ACCUMULATION OF DEGREE DAYS
BASE 10

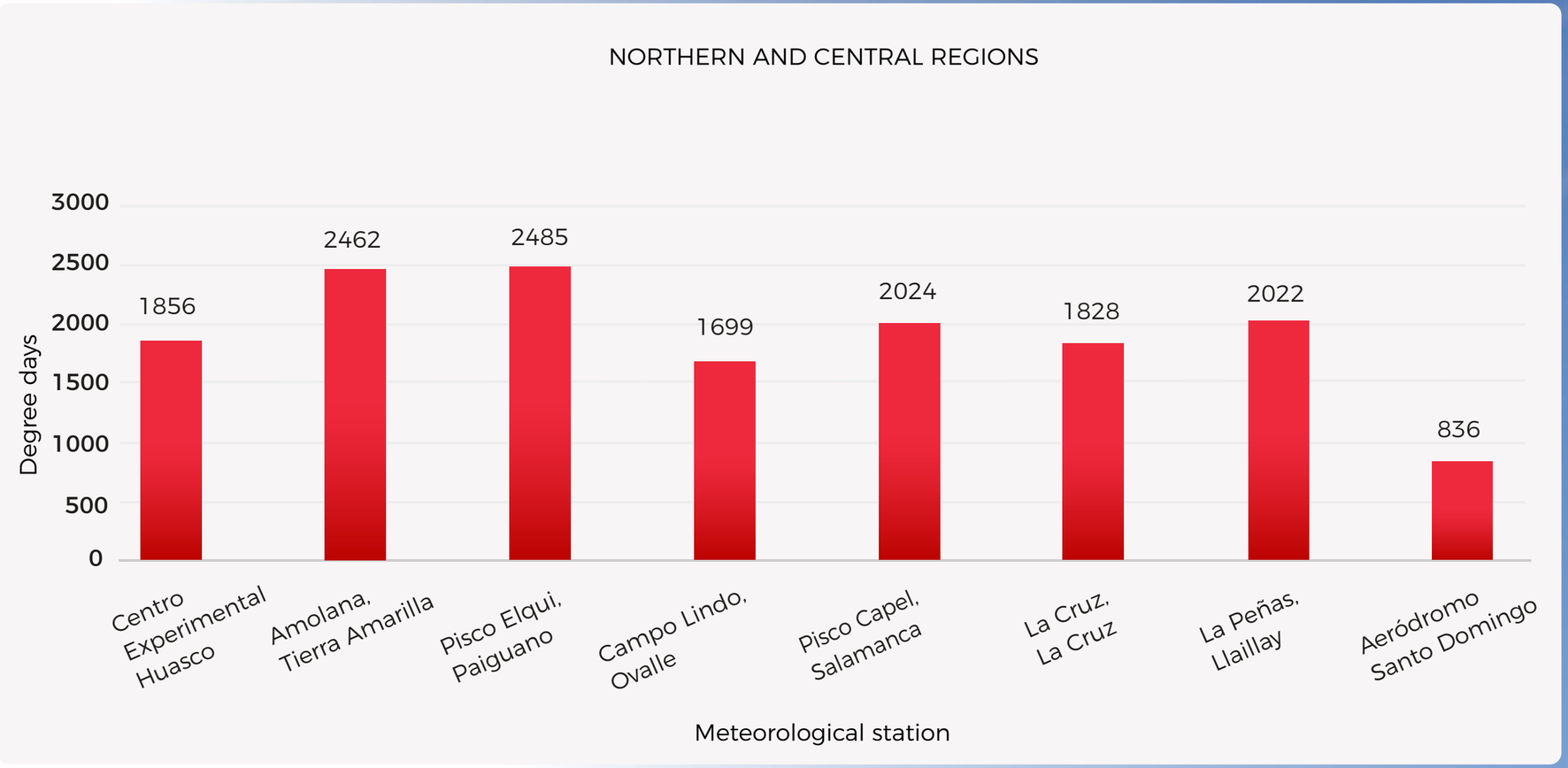


Figure 8. Accumulation of Degree Days (base 10°C) for the 2023-2024 season at meteorological stations in the Northern and Central regions.
Source: INIA Agrometeorological Network.

The accumulation of Degree Days (GD) in the northern localities and the Valparaíso region resented values below 1000 GD (Coast) to over 2400 GD in Paihuano and Tierra Amarilla (Figure 8).

ACCUMULATION OF DEGREE DAYS

BASE 10

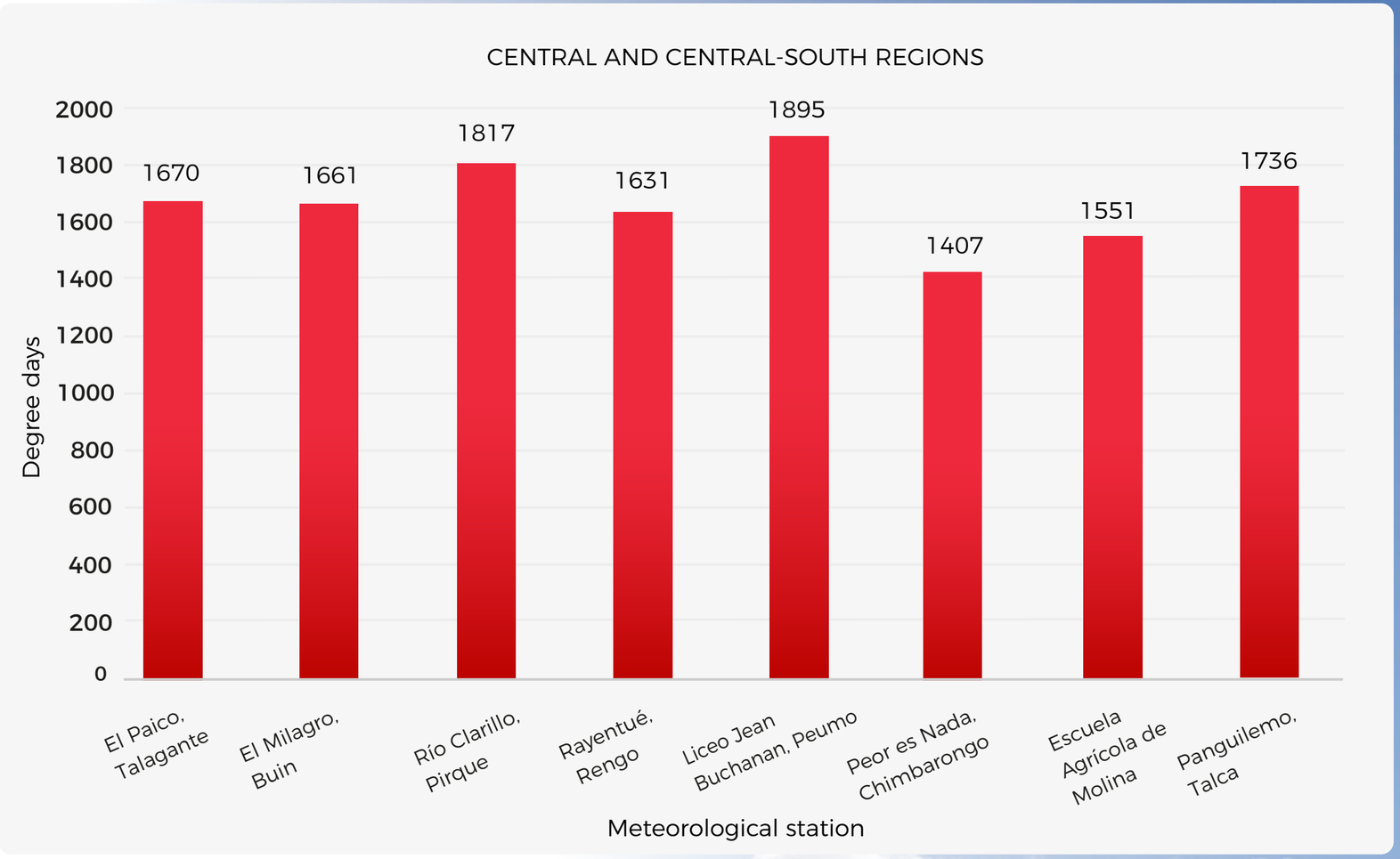


Figure 9. Accumulation of Degree Days for the 2023-2024 season at meteorological stations in the Central and Central-South regions. Source: INIA Agrometeorological Network.

In the Central and Central-South zone, the accumulation of degree days was found between 1407 DG in Chimbarongo to 1895 DG in Peumo, in the O'Higgins region and the town of Pirque in the Metropolitan Region (Figure 9).

ACCUMULATION OF DEGREE DAYS

BASE 10

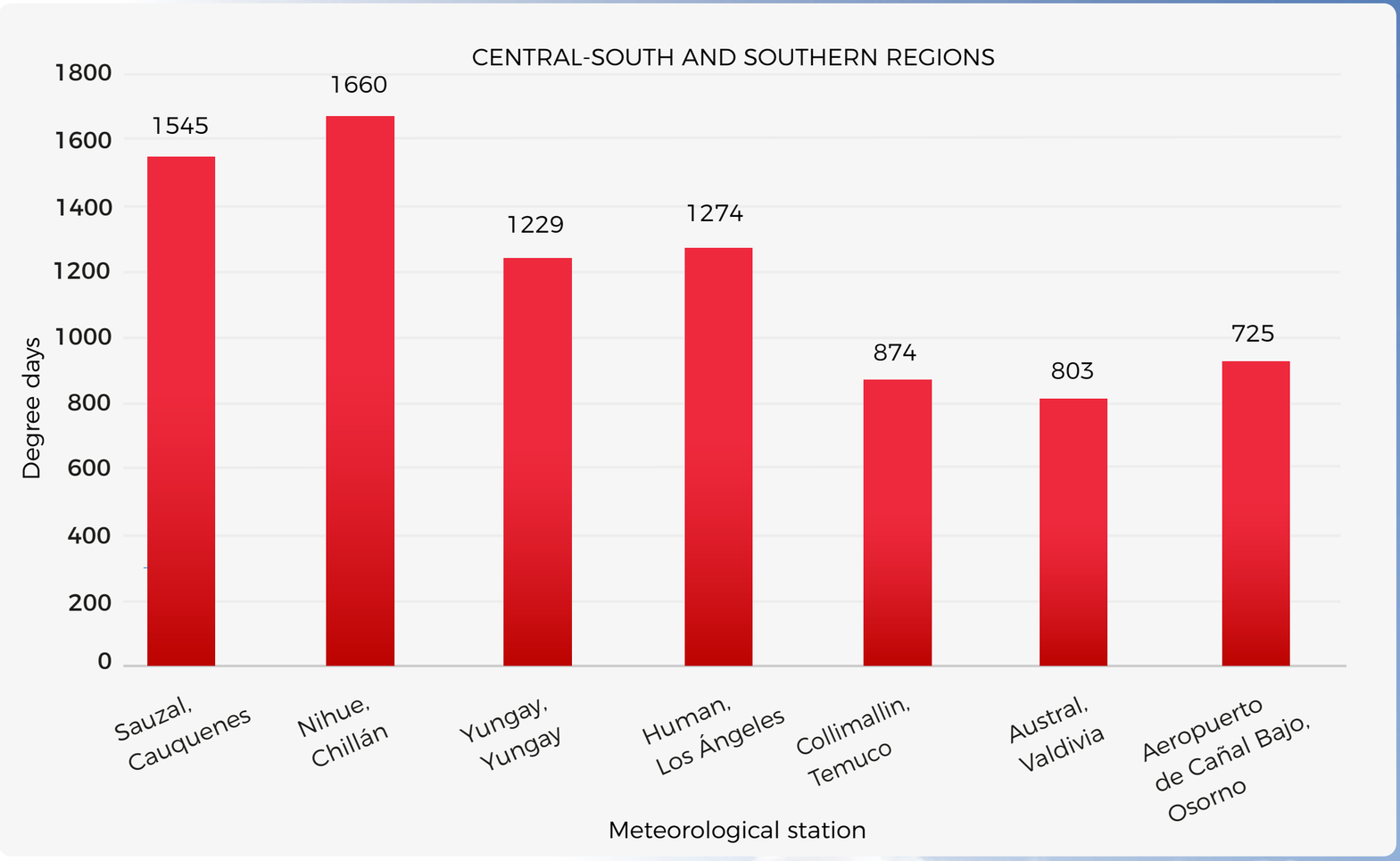


Figure 10. Accumulation of Degree Days (base 10°C) for the 2023-2024 season at meteorological stations in the Central-South and Southern regions. Source: INIA Agrometeorological Network.

In the Central-South and South-Central regions, the degree-days ranged from 1660 DG in Chillán to 725 DG in Osorno, complicating the ripening of the grapes (Figure 10).

DEVELOPMENT AND HARVEST

2023-2024 SEASON

NORTHERN REGIONS

The water deficit advanced the harvest by an average of 2 to 3 weeks.

• In the **Arica and Parinacota** regions, the heat waves at the beginning of 2024 reduced production and advanced the harvest by up to 4 weeks.

• The regions of **Atacama and Coquimbo** had a start to the season with low winter rains, which significantly reduced the availability of water for wine production. The vineyards were in very good phytosanitary conditions without damage from frost.

CENTRAL REGIONS

• In the **Aconcagua** Valley, the vineyards benefited from good water availability at the beginning of the season, both in the soil and in surface flows, and from a spring without damage from frost. The harvest was delayed by 1 to 2 weeks.

• In the **Casablanca** Valley, sprouting tended to be maintained or started slightly earlier than in the previous season. The development of the strains and harvest dates were quite heterogeneous, with complications in the development of flowering and fruit set. The harvest was delayed by 2 to 3 weeks.

• For the **Maipo** Valley, at the beginning of a cool spring, frost damage was recorded in September and early October in red varieties from mountainous areas. High temperatures occurred in early summer and decreased towards harvest. The vineyards showed heterogeneity in grape maturity. The harvest was delayed an average of 1 to 2 weeks.

• The **Cachapoal** Valley began the season with greater water availability in the soil, with slight delays in budding and a longer than expected veraison. The spring floods caused an estimated reduction in vineyard area, which affected part of the production. High temperatures at the beginning of the summer and moderate temperatures and rainfall at harvest time affected the development of the vines. The harvest started with an average delay of 2 to 3 weeks.

VINTAGE
2024 CHILE

DEVELOPMENT AND HARVEST

2023-2024 SEASON

CENTRAL REGIONS

• In the **Colchagua** Valley, the vineyards had good water availability, while sprouting reacted differently in the different vineyards at the beginning of the season, and with the complex development of the phenological stages of flowering and fruit setting. The ripening of the grapes was heterogeneous, with an average delay of 2 to 3 weeks at the beginning of the harvest.

• For the vineyards of the **Curicó** Valley, the season began with good water availability. The bud break was different from the previous season, with slight advances and delays for the different varieties. In general, growers reported no significant frosts. Fruit set was once, and harvest began with an average delay of 2 to 3 weeks.

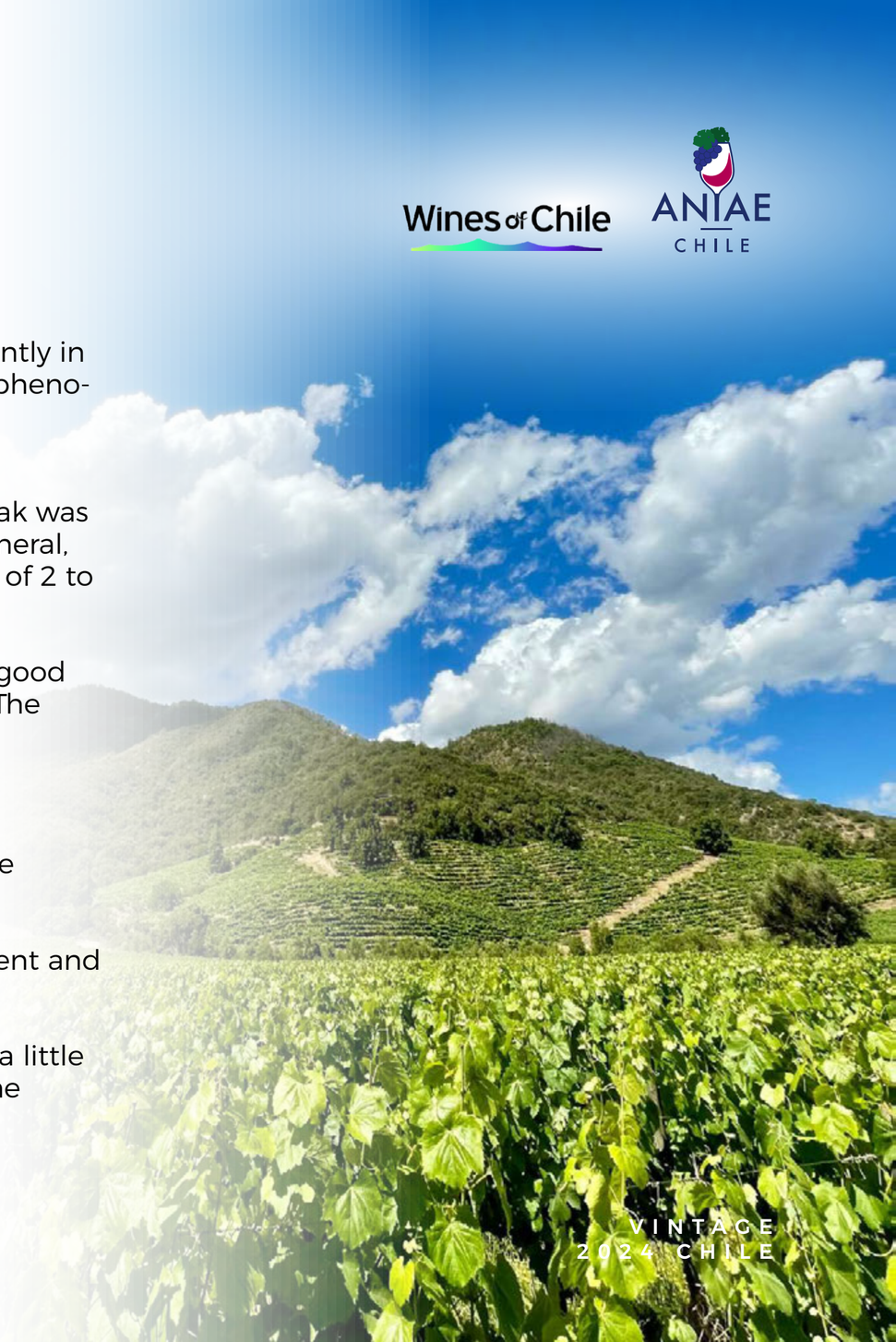
• In the **Maule** Valley, the good availability of water and the low incidence of frost contributed to a good development of the season. Autumn rains complicated the timing of the harvest in the vineyards. The harvest started with a delay of 1 to 4 weeks.

SOUTHERN REGIONS

• The vineyards in the **Ñuble** and **Biobío** regions were in good vegetative state, without drought. The average delay in harvest was between 1 and 2 weeks.

• For the **Biobío** and **Malleco** valleys, the presence of late frosts significantly affected the development and production of the vineyards. The start of the harvest was delayed by up to 4 weeks.

• Meanwhile, in the **southern** area of **Cautín** and **Osorno**, spring frosts and sprouting were delayed a little with grape development slower than expected, given the temperature conditions of the season. The harvest started 3 to 4 weeks later than expected.



BEGINNING OF THE 2024 VINTAGE

START OF HARVEST 2024

The start of the 2024 harvest was generally 2 to 3 weeks later than the historical average (Figure 11).

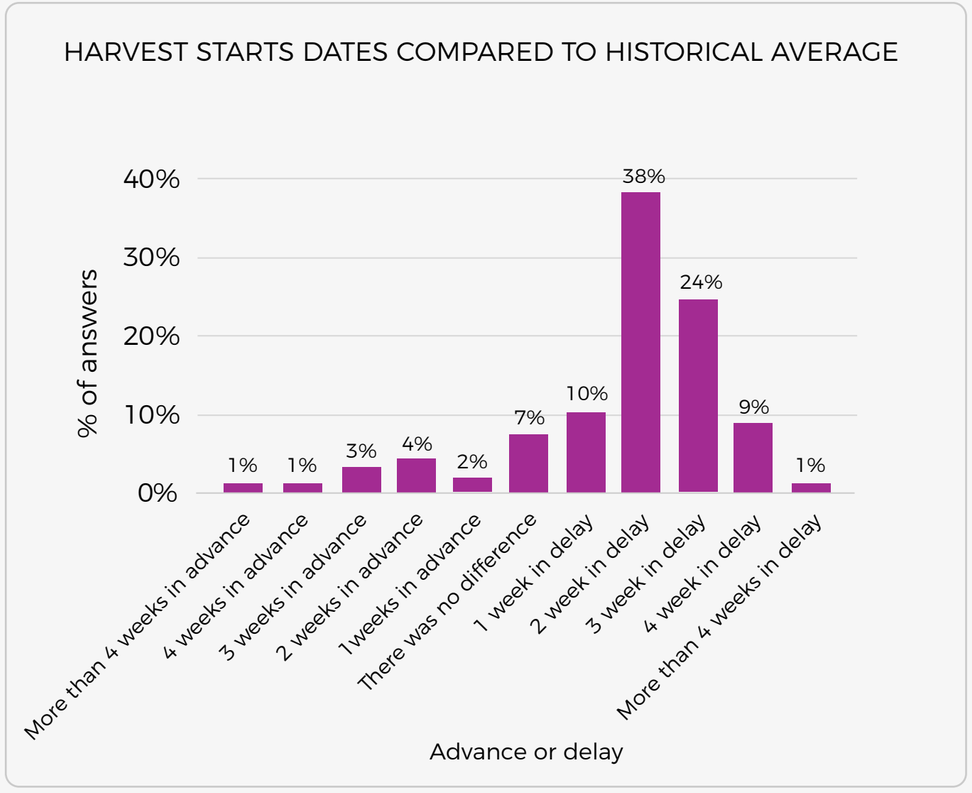


Figure 11. Harvest advances or delays reported by producers nationwide for the 2024 harvest compared to the historical average. Source: Vintage Survey 2024, Grape Growers.

PHYSICAL CHEMICAL PARAMETERS AT HARVEST

RESPECT TO THE HISTORICAL AVERAGE

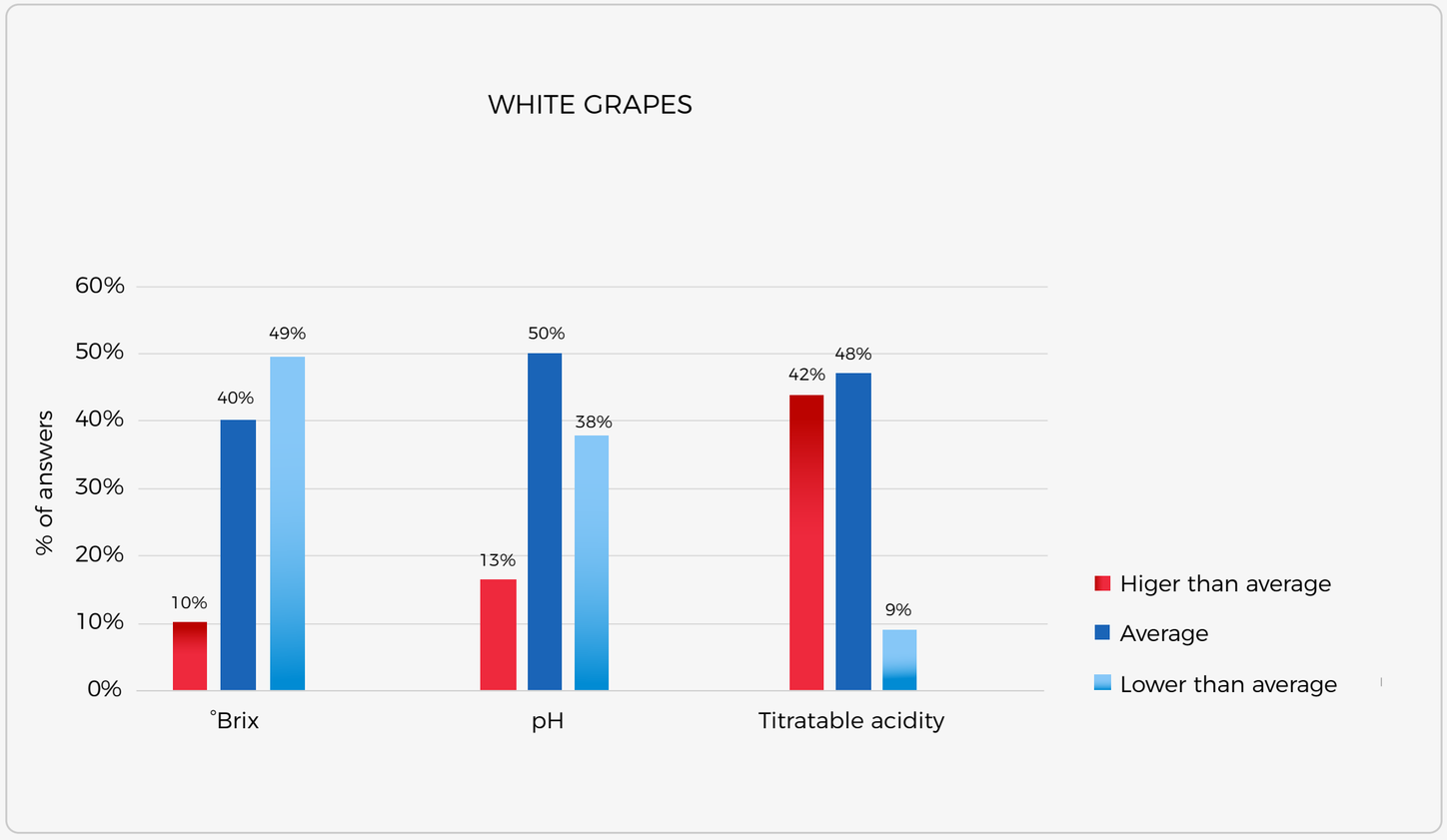


Figure 12. Physical-chemical parameters of white grapes at harvest compared to the historical averages.
Source: Vintage Survey 2024, Wine Producers.

Regarding the harvest physical-chemical parameters, the majority of respondents reported levels similar to the historical average of pH and titratable acidity.
However, 49% of the white grapes and 60% of the red grapes reported a lower concentration of °Brix (Figures 12 and 13).

PHYSICAL CHEMICAL PARAMETERS AT HARVEST

RESPECT TO THE HISTORICAL AVERAGE

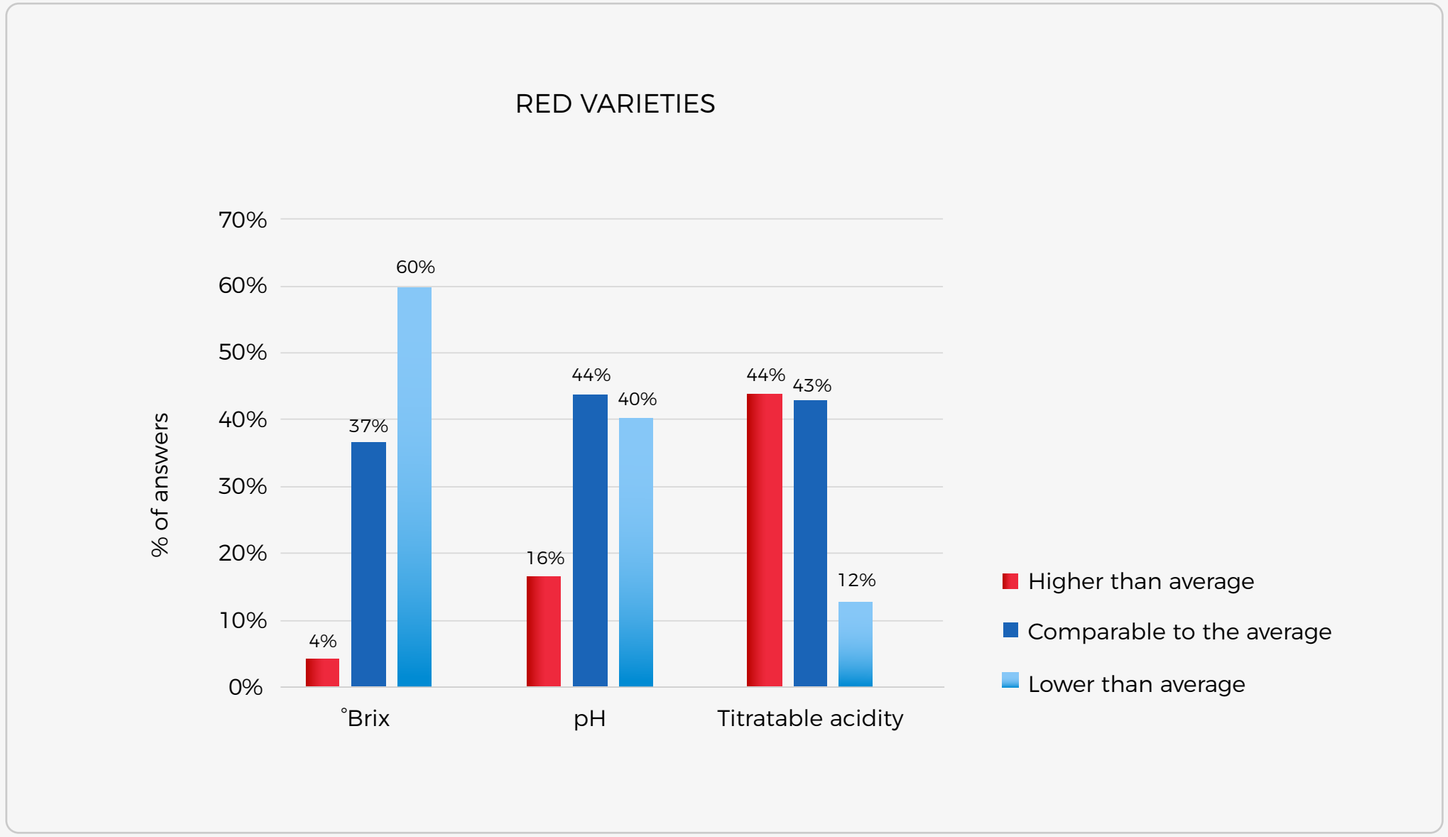


Figure 13. Physical-chemical parameters of red grapes at harvest compared to the historical average.
Source: Vintage Survey 2024, Wine Producers.

PHENOLIC COMPOSITION AT HARVEST

RESPECT TO THE HISTORICAL AVERAGE

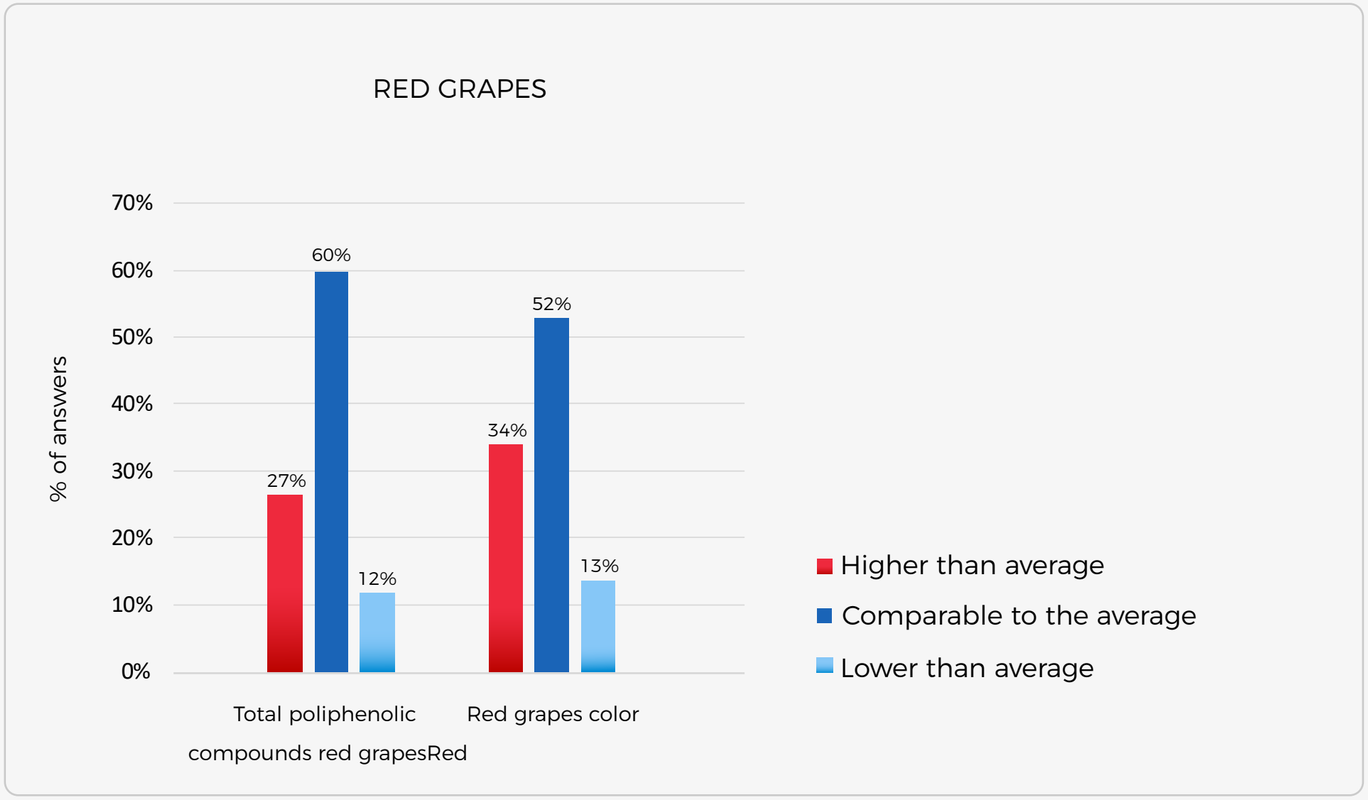


Figure 14. Total phenolic compounds and intensity of color of red grapes at harvest compared to the historical average. Source: Vintage Survey 2024, Wine Producers.

The level of total phenolic compounds and color intensity in red grapes were mostly comparable to the average (Figure 14).

SANITARY CONDITIONS

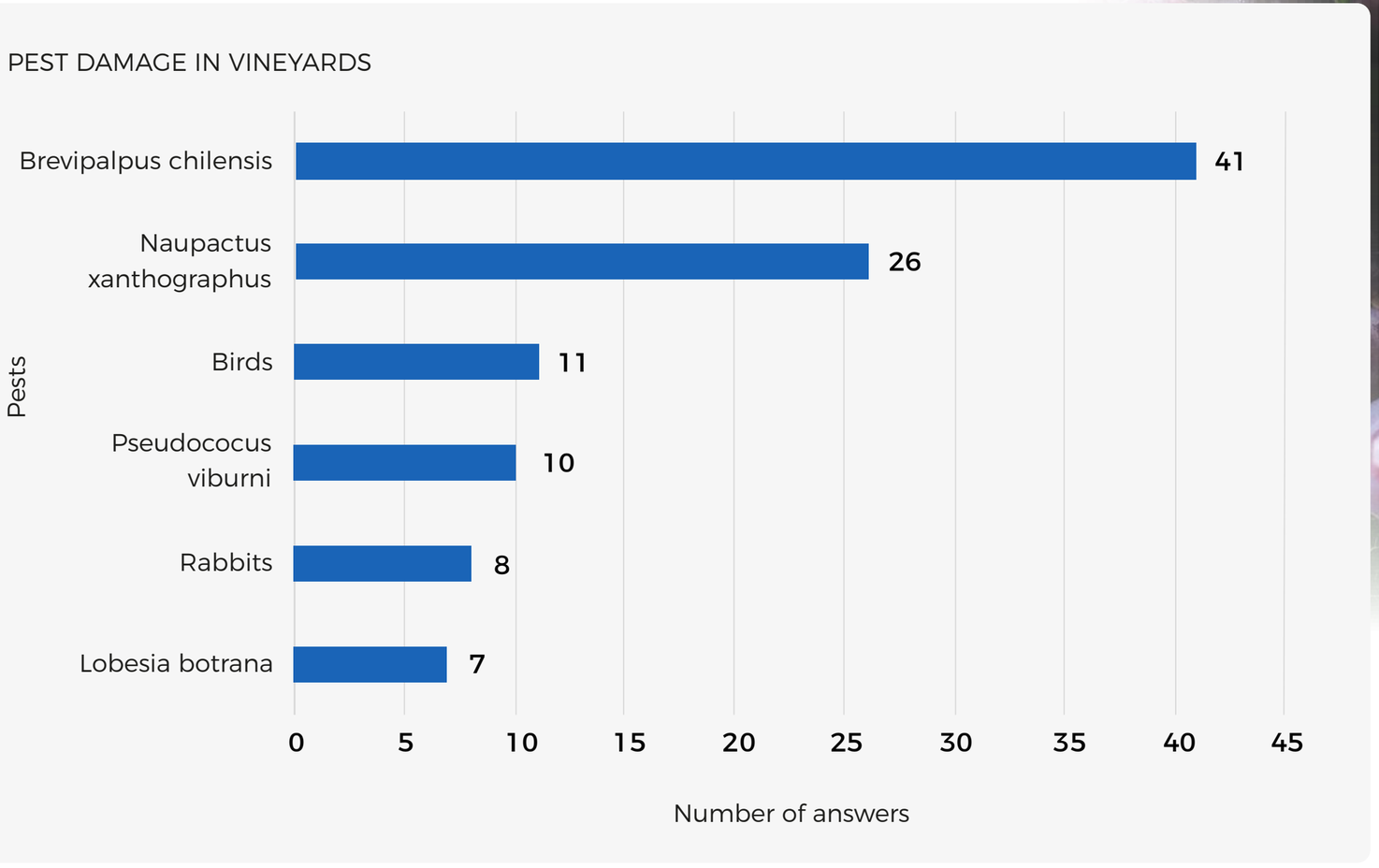


Figure 15. Presence of pests in vineyards for the 2023 -2024 season.
Source: Vintage Survey 2024. Grape Growers.

The good health of the grapes was an aspect highlighted by the producers. However, the pest that most affected the vineyards was the spider mite attack (Brevipalpus chilensis), followed by the Naupactus xanthographus. Bird infestation was also highlighted by the grape growers (Figure 15).

SANITARY CONDITIONS

Among the vine diseases, powdery mildew and the wood fungus complex were the most frequent, followed by botrytis (Figure 16).

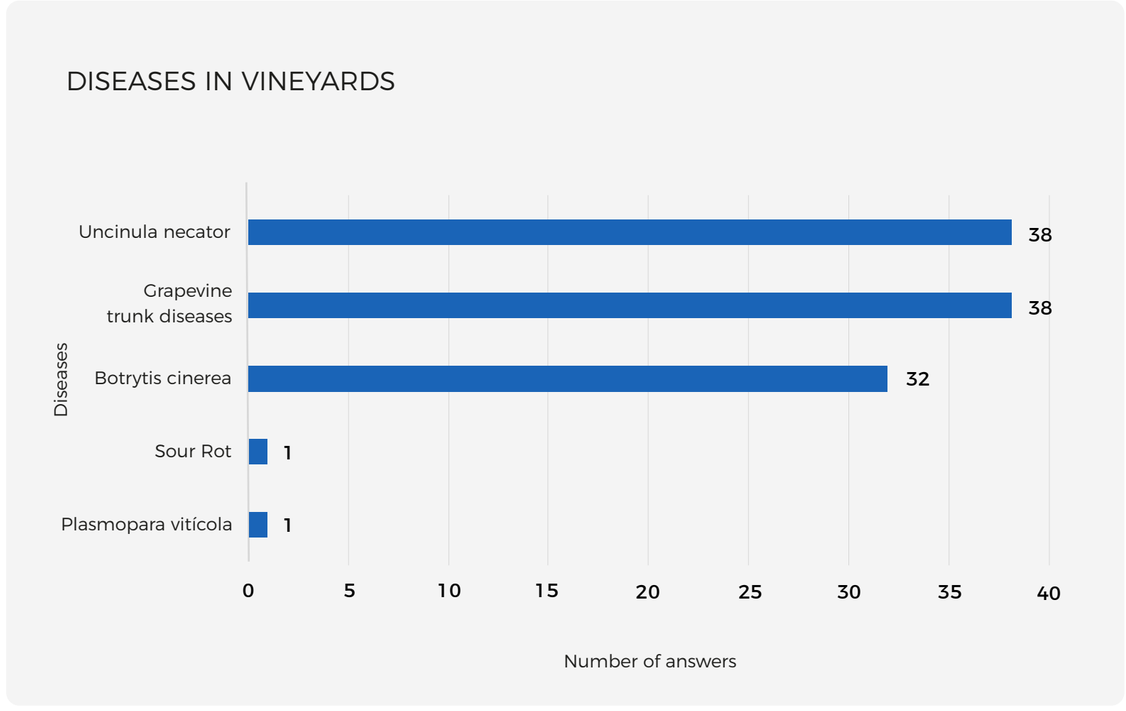


Figure 16. Presence of diseases in vineyards for the 2023 -2024 season.
Source: Vintage Survey 2024, Grape Growers.

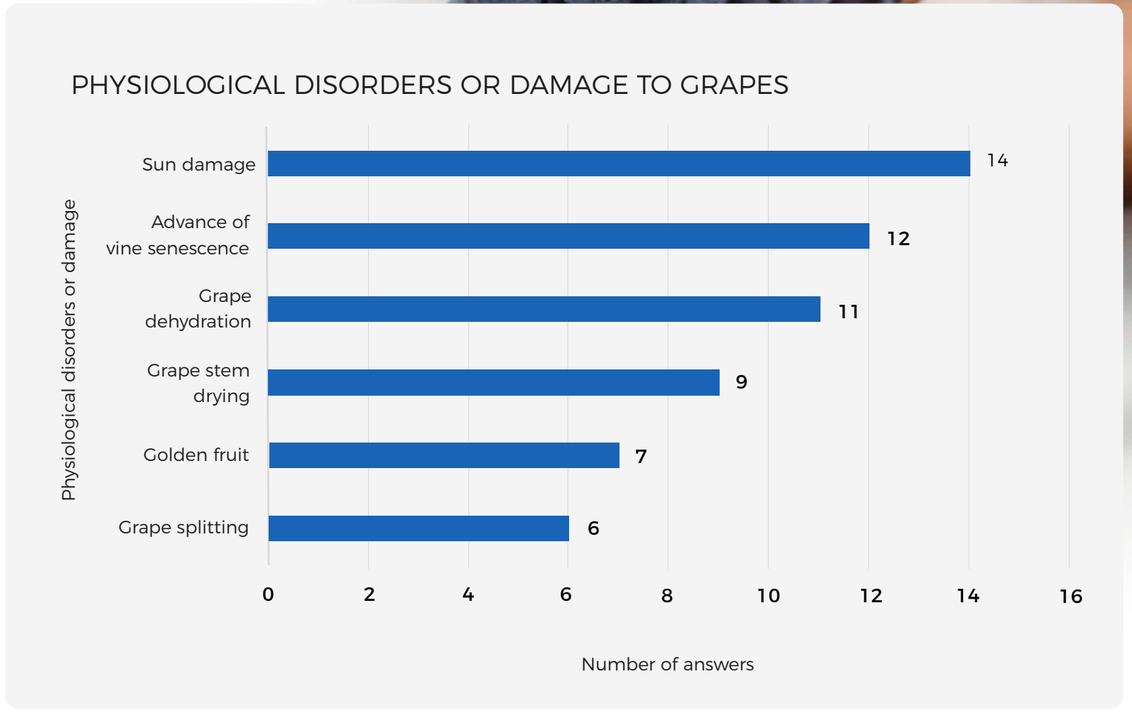


Figure 17. Presence of physiological disorders in vineyards for the 2024 -2024 season.
Source: Vintage Survey 2024, Grape Growers.

GRAPE HEALTH AT HARVEST

The sanitary condition of the grapes at harvest was reported as good to very good, with 83% for white varieties and 92% for red varieties (Figures 18 and 19).

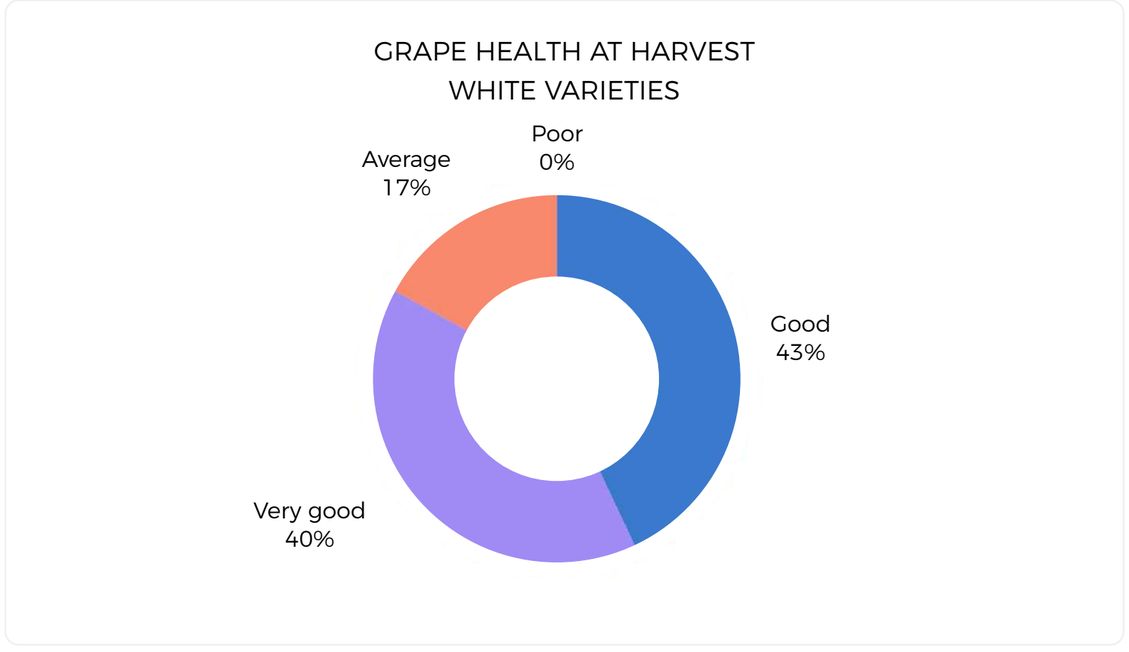


Figure 18. Health status of grapes arriving at the winery, white varieties.
Source: Vintage Survey 2024, Wine Producers.

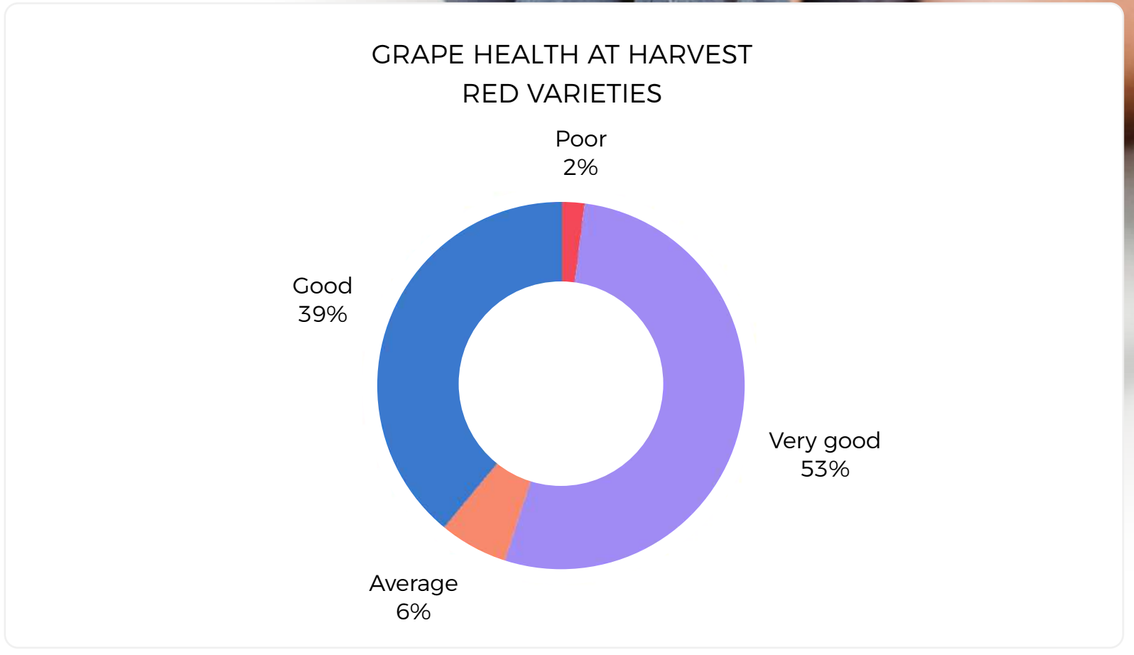


Figure 19. Health status of grapes arriving at the winery, red varieties.
Source: Vintage Survey 2024, Wine Producers.

GRAPE QUALITY

Among the parameters that are important for the quality of the harvest, the acidity of the white wines was above average, and the aromatic intensity was at a level similar to the historical average (Figure 20).

For reds, aromatic intensity, color intensity, tannin maturity and concentration in the mouth remained within historical averages (Figure 21).

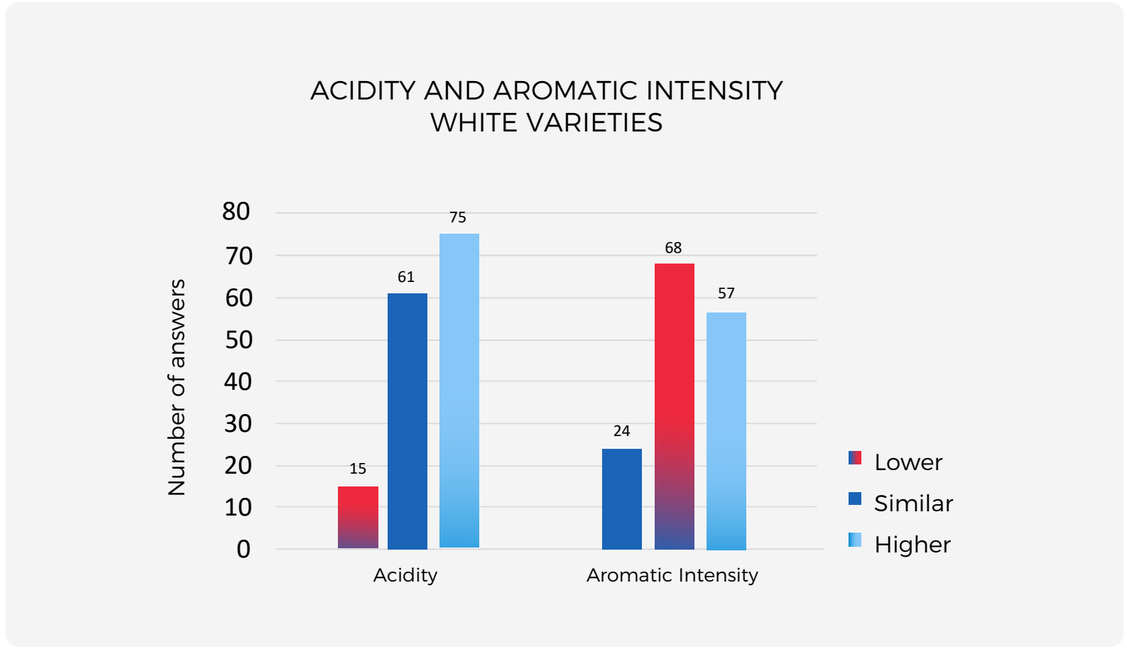


Figure 20. Acidity and aromatic intensity levels, white varieties compared to the historical average. Values represent the sum of responses for each variety. Source: Vintage Survey 2024, Wine Producers.

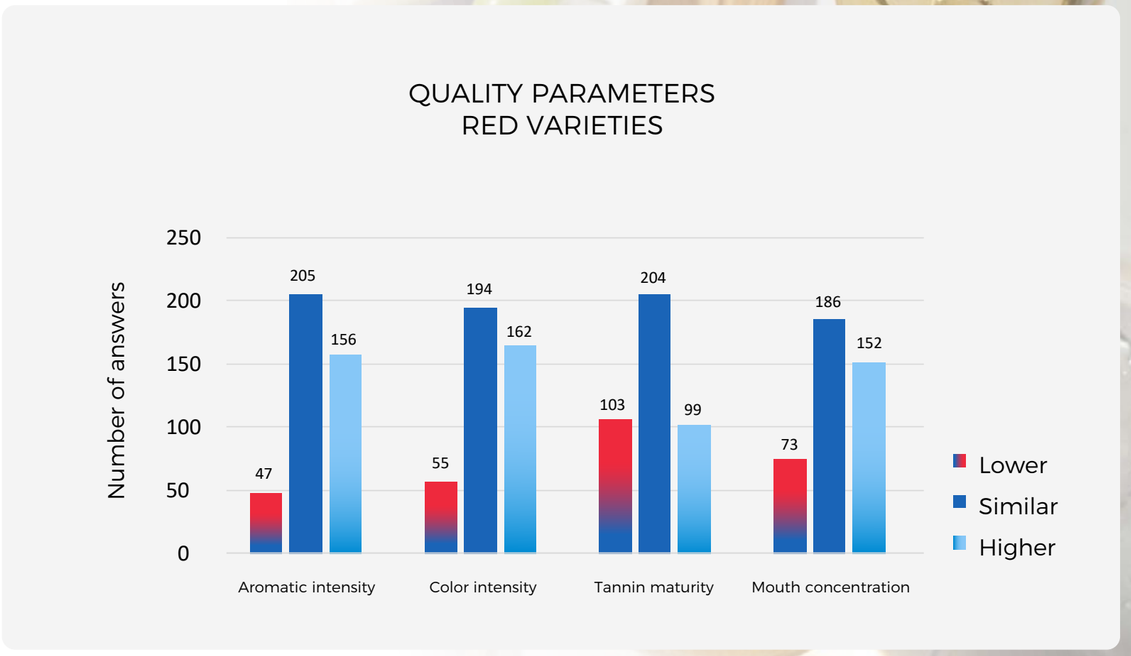


Figure 21. Levels of Aromatic Intensity, Color Intensity, Tannin Maturity, and Mouth Concentration of Red Varieties compared to the historical average. Values represent the sum of responses for each variety. Source: Vintage Survey 2024, Wine Producers.

GRAPE AND WINE QUALITY OF VINTAGE 2024

COMPARED TO VINTAGE 2023

Overall Quality of Grapes and White and Red Wines

The general quality of the grapes and white and red wines is between similar to higher levels compared to the 2023 harvest, an aspect highlighted by winegrowers and winemakers (Figures 22 to 29).

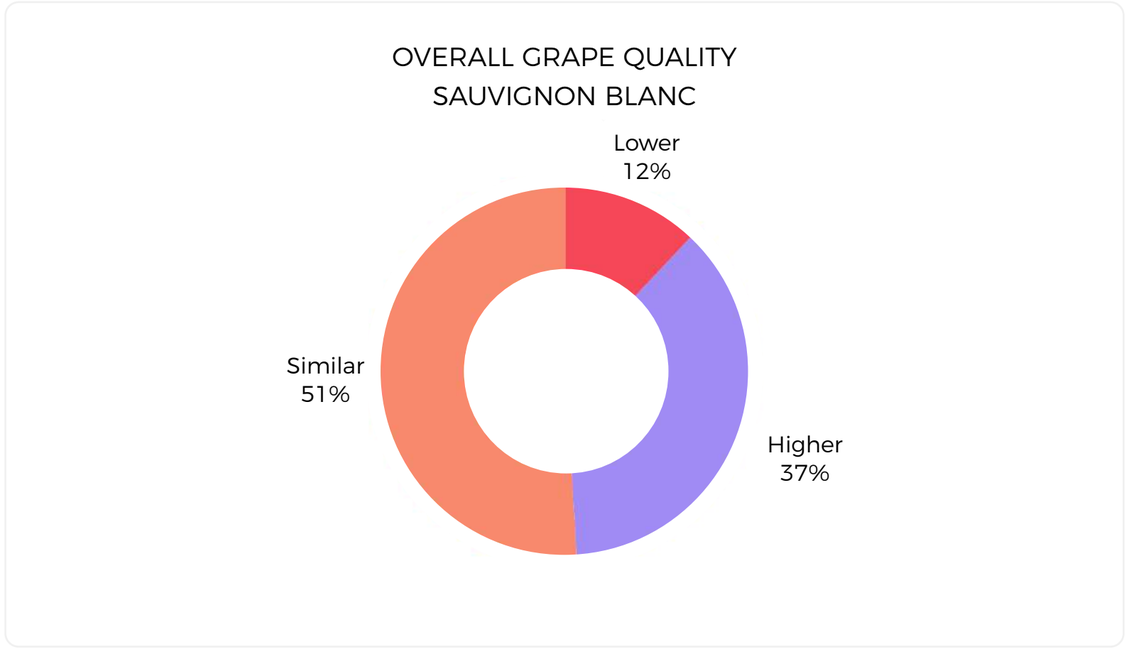


Figure 22. Overall quality of Sauvignon Blanc grapes, compared to 2023.
Source: Vintage Survey 2024, Wine Producers.

Figure 23. Overall quality of Sauvignon Blanc wines.
Source: Vintage Survey 2024, Wine Producers.

GRAPE AND WINE QUALITY OF VINTAGE 2024

COMPARED TO VINTAGE 2023

CHARDONNAY

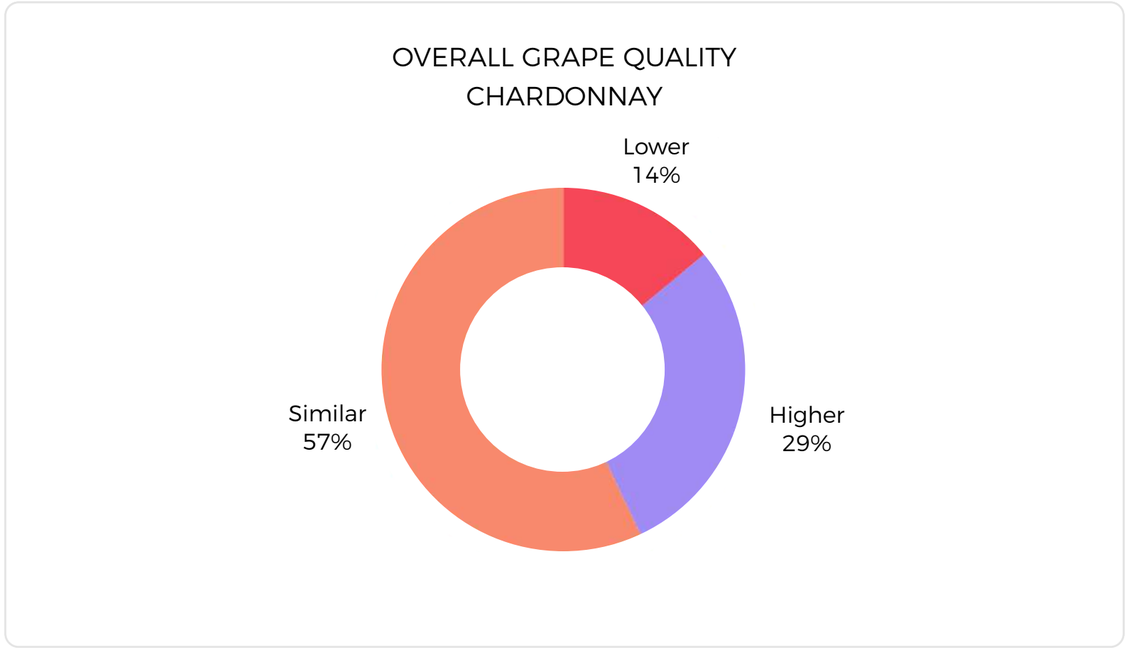


Figure 24. Overall quality of Chardonnay grapes, compared to 2023.
Source: Vintage Survey 2024, Wine Producers.

Figure 25. Overall quality of Chardonnay wines.
Source: Vintage Survey 2024, Wine Producers.

GRAPE AND WINE QUALITY OF VINTAGE 2024

COMPARED TO VINTAGE 2023

CABERNET SAUVIGNON

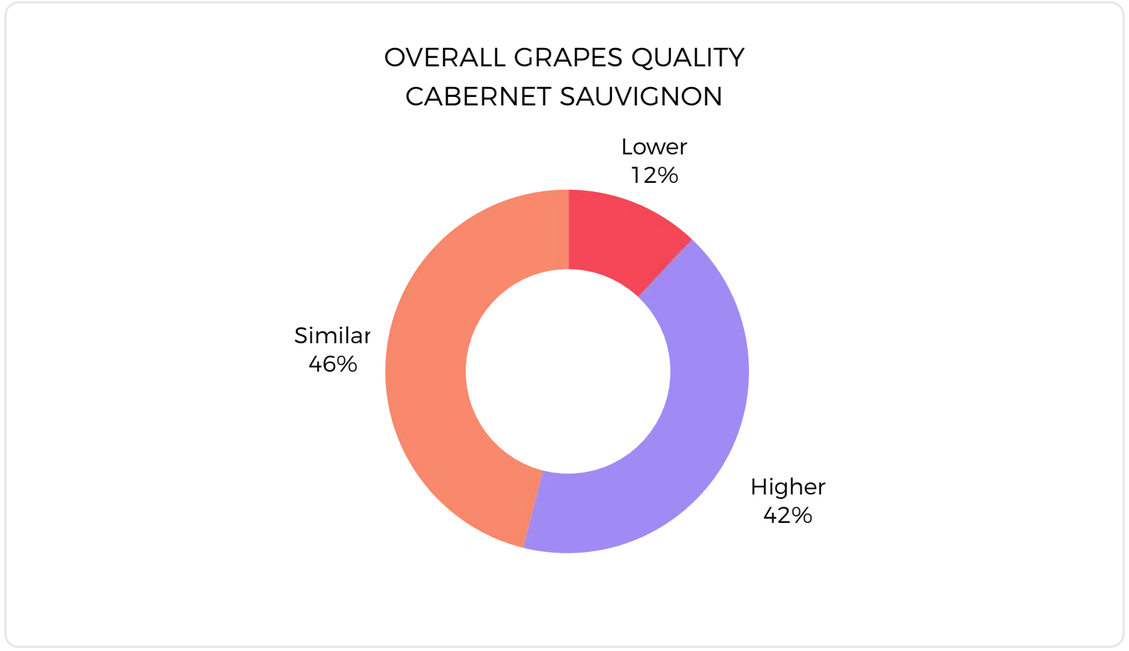


Figure 26. Overall quality of Cabernet Sauvignon grapes, compared to 2023.
Source: Vintage Survey 2024, Wine Producers..

Figure 27. Overall quality of Cabernet Sauvignon wines.
Source: Vintage Survey 2024, Wine Producers..

GRAPE AND WINE QUALITY OF VINTAGE 2024

COMPARED TO VINTAGE 2023

CARMENÈRE

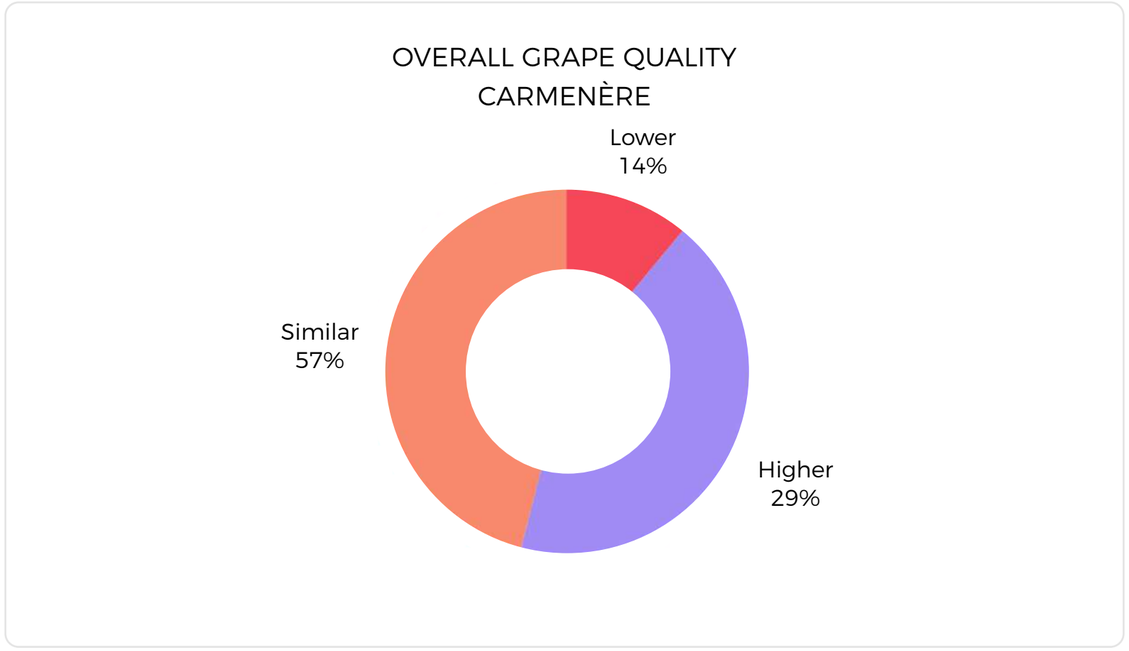


Figure 28. Overall quality of Carmenère grapes, compared to 2023.
Source: Vintage Survey 2024, Wine Producers.

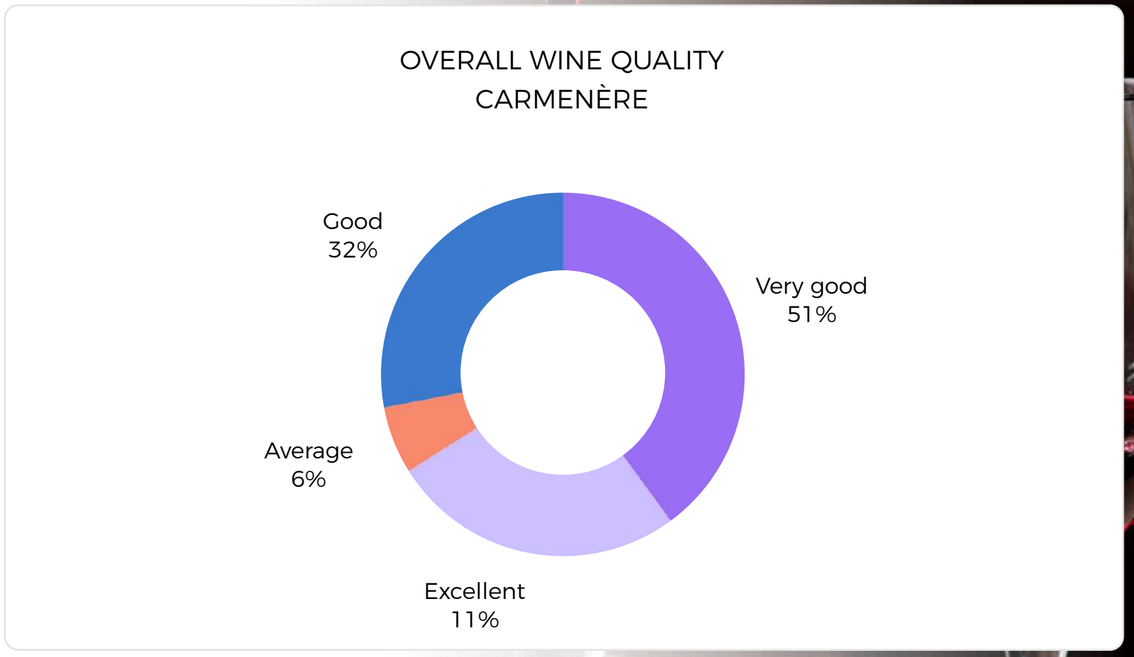


Figure 29. Overall quality of Carmenère wines.
Source: Vintage Survey 2024, Wine Producers.

GRAPE YIELDS
COMPARED TO VINTAGE 2023

Grape yields of white varieties in the season were mostly presented with an increase of 10%. In second place, there was a 20% decrease in production (Figure 30).

For red varieties, a 10% increase in production was mainly estimated for the 2024 vintage (Figure 31).

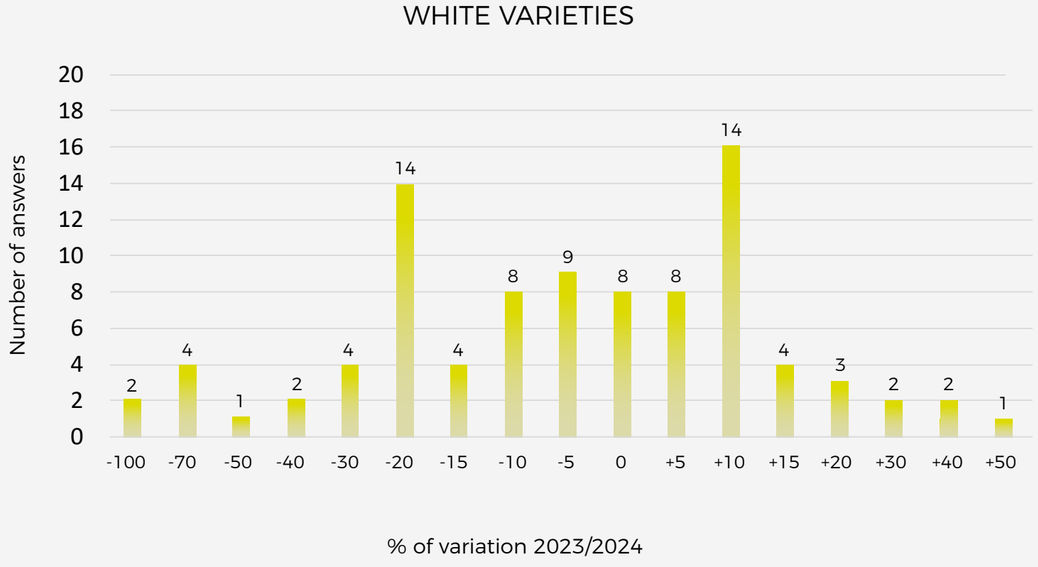


Figure 30. Total yield of white varieties compared to the previous season.
Source: Vintage Survey 2024, Wine Producers.

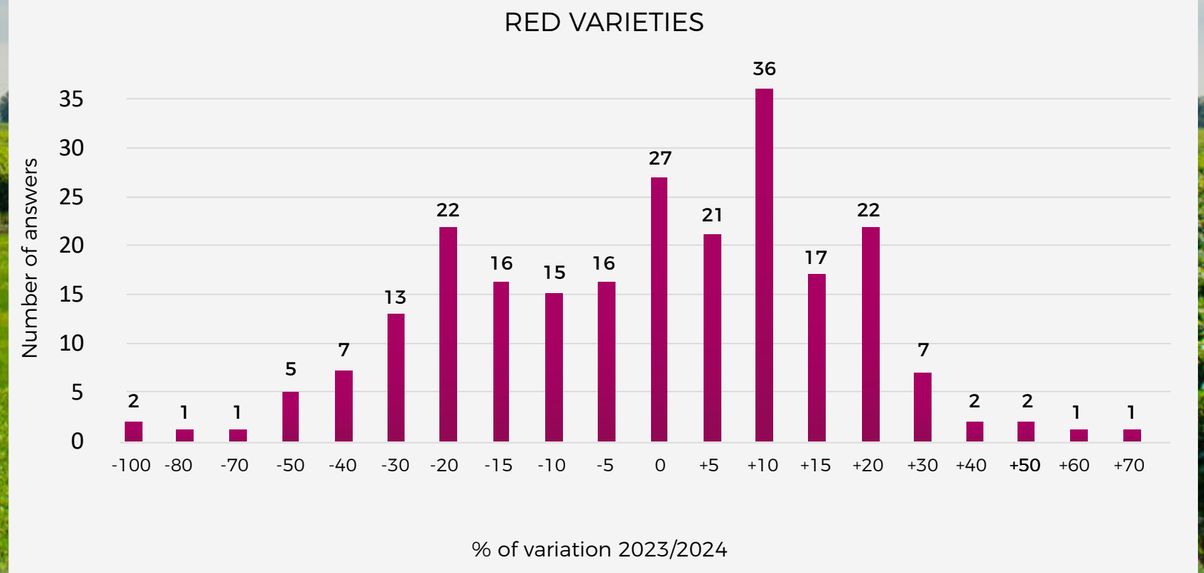


Figure 31. Total yields of red varieties compared to the previous season.
Source: Vintage Survey 2024, Grape Growers.

FAVORABLE ASPECTS OF THE SEASON

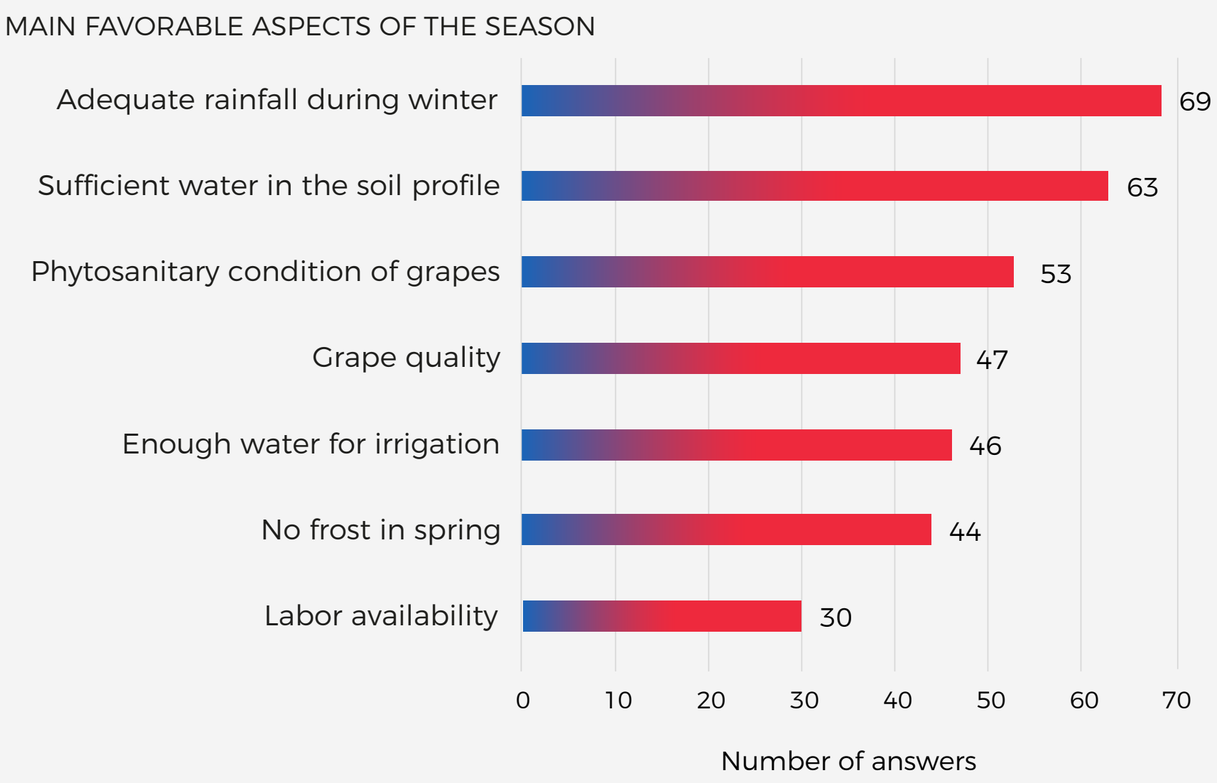


Figure 32. Main favorable aspects of the 2024 viticultural season.
Source: Vintage Survey 2024, Grape Growers.

Among the **favorable aspects** highlighted by the growers, **water conditions are firstly**, adequate rainfall during the winter and su-Xicient water in the soil profile, followed by **good phytosanitary conditions and grape quality** (Figure 32).

UNFAVORABLE ASPECTS OF THE SEASON

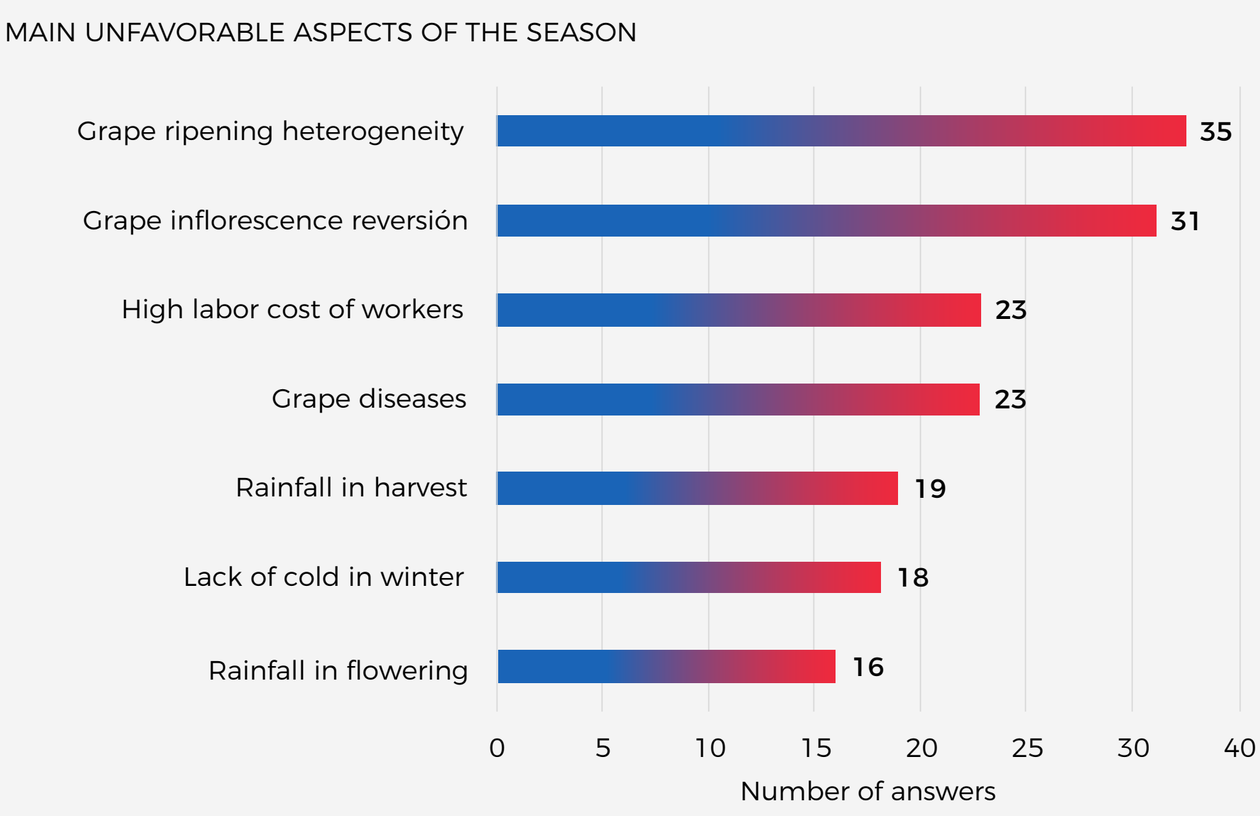


Figure 33. Main unfavorable aspects of the 2024 growing season.
Source: Vintage Survey 2024, Wine Producers.

Grape heterogeneity is reported as the main **unfavorable aspect for grape growers.** Botrytis and vine diseases had a significant impact on vineyards. Climatic aspects such as **rainfall during harvest and flowering and lack of cold** in winter were highlighted by the growers (Figure 33).

UNFAVORABLE ASPECTS OF THE SEASON

Among the oenological difficulties in winemaking, complications in enzymatic clarification of white musts (Figure 34) and lack of color in red musts (Figure 35) were mentioned.

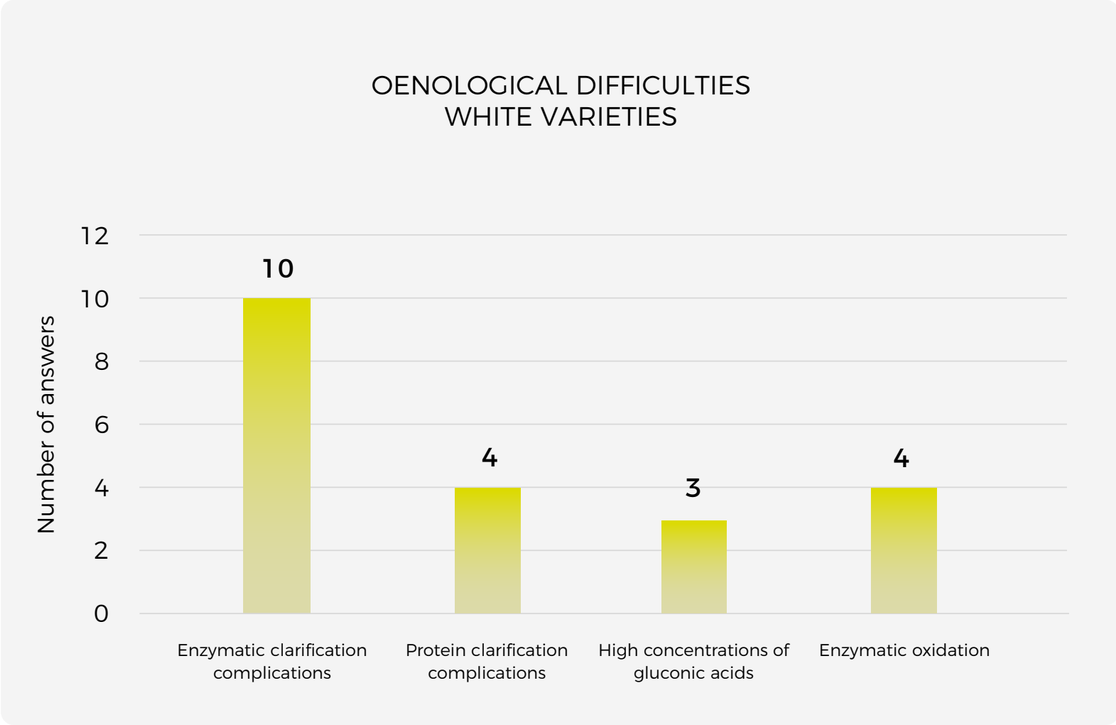


Figure 34. Main oenological difficulties in white musts in the 2024 vintage.
Source: Vintage Survey 2024, Wine Producers.

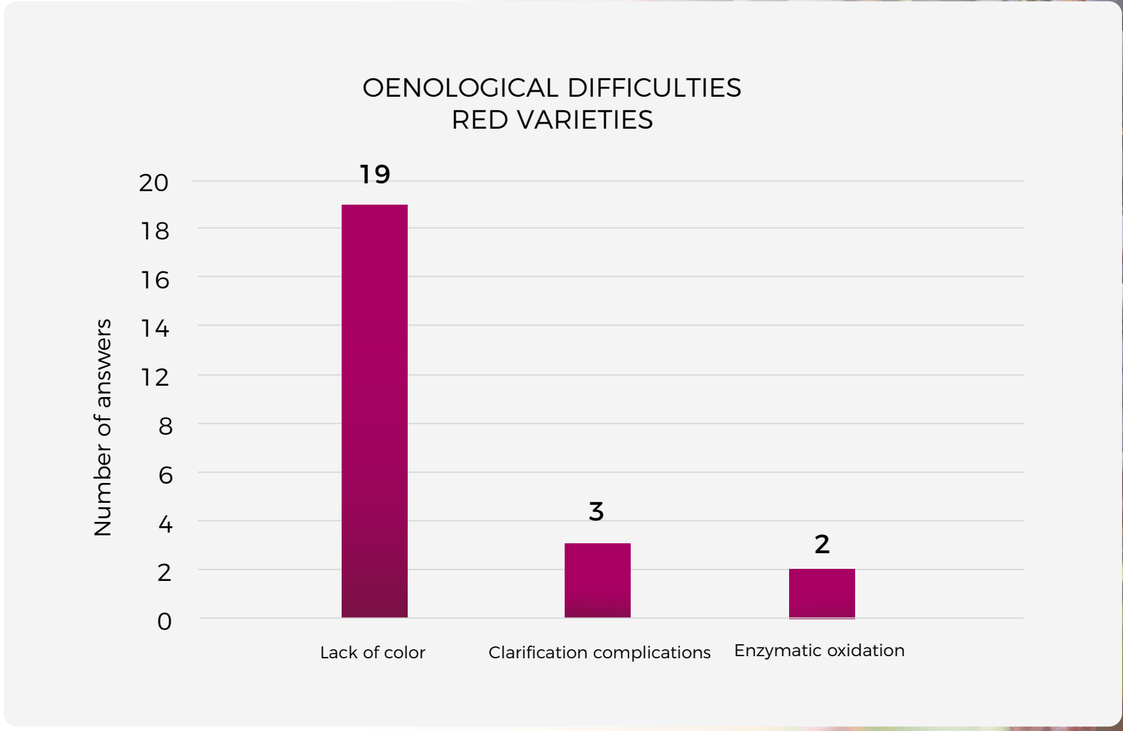
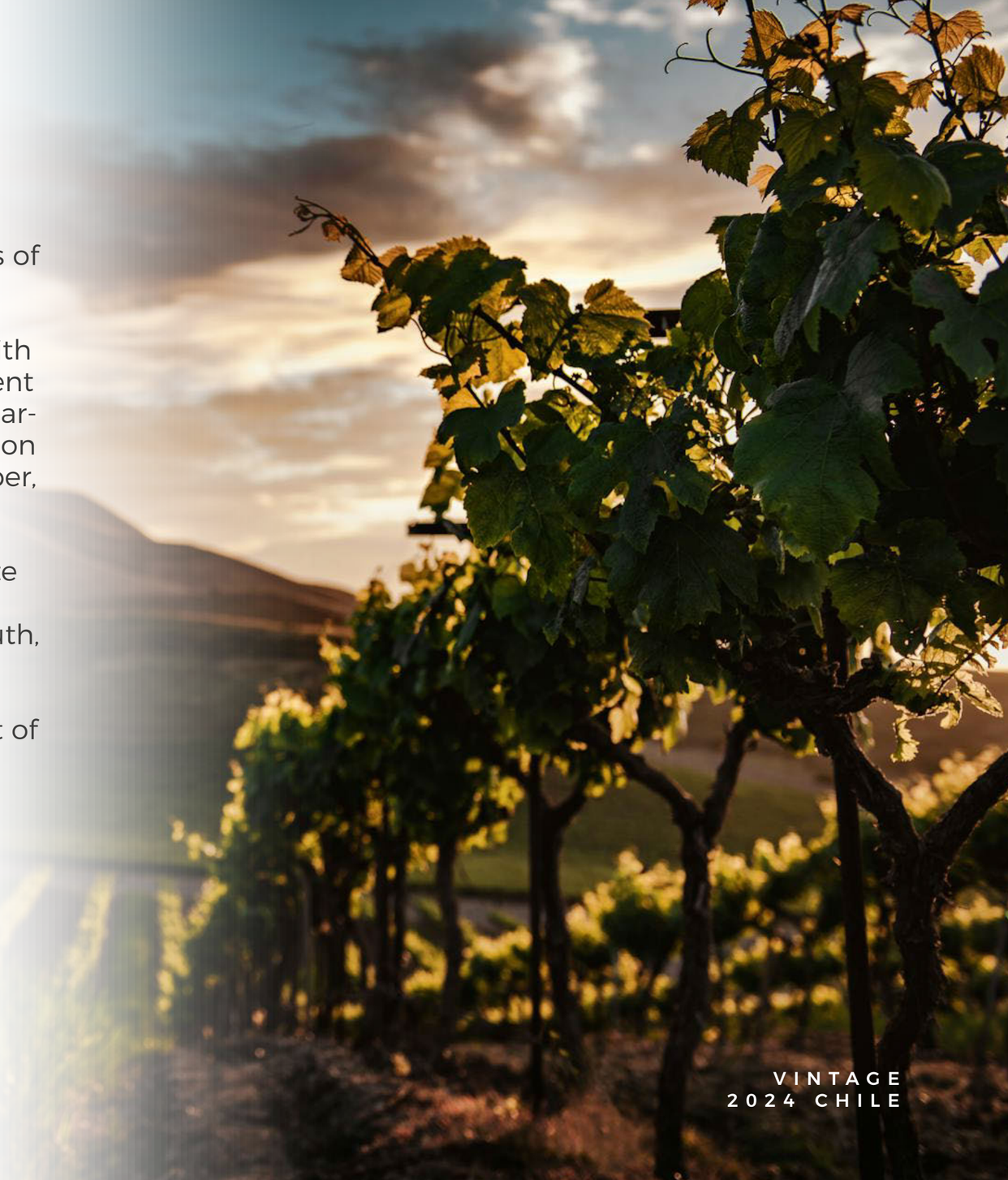


Figure 35. Main oenological difficulties for red musts in the 2024 vintage.
Source: Vintage Survey 2024, Wine Producers.

CONCLUSIONS

The 2023 - 2024 season was complex given the agroclimatic conditions of the wine valleys, with major water restrictions and early harvest in the northern part of the country, as opposed to the central and southern areas, which had very good water conditions in the early season, but with cooler springs and hot early summers that complicated the development of the phenological stages of the grapevines, delaying the start of the harvest by 1 to 4 weeks in the different wine valleys. The southern regions, on the other hand, had the most complex season, with late frosts in October, cool springs and rains at harvest time, which delayed the harvest.
The slow ripening of the grapes also had a positive effect on the musts and wines, with greater aromatic intensity and good acidity in the white musts and a decrease in °Brix at harvest in the red grapes, resulting in fresher wines with greater color intensity and concentration in the mouth, which is reflected in the overall quality of the grapes and wines of the 2024 vintage.
Grape growers and winemakers point to a **complex 2024 vintage**, but of **very good quality** for both red and white wines.



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COMPANIES THAT PARTICIPATED IN THE VINTAGE 2024

1. Agrícola las Pircas
2. Agricola Las Tórtolas
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9. Agricultora Cadden
10. Agromix
11. Agropecuaria San Gerardo
12. Antinori Chile
13. Aresti Wine
14. Astaburuaga
15. Atypical Vinos
16. Barón Philippe de Rothschild
17. Brio Wine
18. Calyptra
19. Casa Donoso
20. Casa Lamarca
21. Casa Solis
22. Casas del Bosque
23. Casas Del Toqui
24. Cooperativa Lagar de los Oasis
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31. Gallo Chile
32. Inagrap Serendipia
33. Inversiones Viña Tierra y Sangre
34. Invina
35. José Miguel Aspillaga Manterola
36. Juana Ortiz Muñoz
37. Las Carmelas
38. Litovid
39. Lugarejo
40. Luis Ortiz Muñoz
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45. P.S. García
46. Pino Román
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51. Sociedad Agrícola Chicureo
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66. Viña Alquihue
67. Viña Alta Alcurnia
68. Viña Andesterra
69. Viña Aromo
70. Viña Azur
71. Viña Barricas de Cauquenes
72. Viña Bunster Zegers
73. Viña Caminomar
74. Viña Casa Acosta
75. Viña Casa Hernández
76. Viña Casa Mesa & Bozzolo
77. Viña Casas del Bosque
78. Viña Casas Patronales
79. Viña Choapa
80. Viña Concha y Toro
81. Viña Cousiño Macul
82. Viña del Pedregal
83. Viña Doña Justina
84. Viña Echeverria
85. Viña El Cóndor
86. Viña El Rosal
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88. Viña Hugo Casanova
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119. Vitivinícola Peter Paul Mc Rostie
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