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1 Austria – The Wine Country

1.1 Austria's Wine-growing Areas and Regions

For the first time since Austria's entry to the European Union, Austria was required by the Regulation (ECC) No. 357/79 of the Council of the European Community to conduct a survey of the area under vines with a reference date of 31 August 1999. Also for the first time, data from the existing viticultural land registers of the wine-producing provinces – Burgenland, Niederösterreich (Lower Austria), Steiermark (Styria) and Wien (Vienna) – were included and analysed as secondary statistics. The Austrian Central Statistical Office obtained the data of the other provinces by conducting a written survey of the vineyard owners.

Austria was determined to have a vineyard area of approximately 48,500 ha. This was about 8,400 ha less than in 1992 at the time of the last vineyard survey, which was conducted as a primary census. The area devoted to white wines had fallen since 1992 by around 17.1% to 36,140 ha; there was a smaller decline in the area devoted to red wine, which fell by 7.3% to 12,350 ha.

Among the reasons for the decrease in vineyard area were vine removal in accordance with EU vine pulling schemes and national reserve campaigns as well as losses due to frost damage.

The 1999 amendment to the Wine Law created a new wine-growing region called "Weinland Austria". The advantage lies in the fact that wines from Niederösterreich and Burgenland, a large area even by European standards, can now be used for the production of *Landwein* (vin de pays). The 2002 amendment also changed the wine region Steiermark's name to "Steirerland".

There are currently 4 wine regions and 19 wine areas defined in Austria.

The four wine regions are defined as Weinland Österreich (the provinces of Lower Austria and Burgenland), Steirerland (the province of Styria), Wien (Vienna), and Bergland Österreich (the provinces Upper Austria, Salzburg, Carinthia, Tyrol, and Vorarlberg).

The wine areas are:

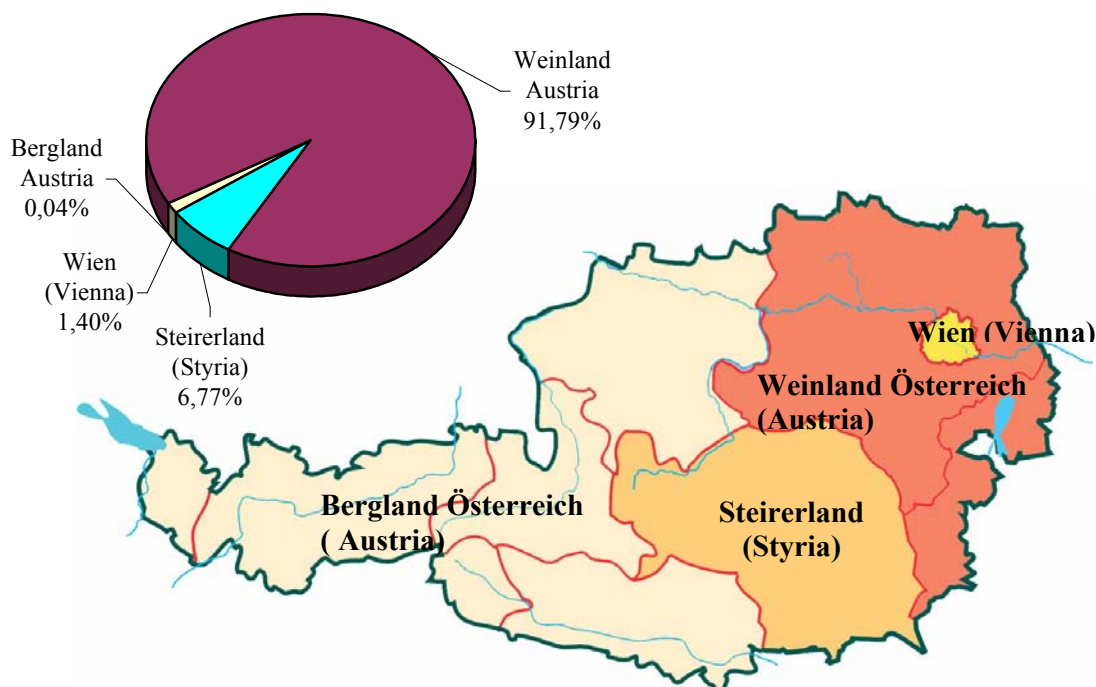
Niederösterreich (the province of Lower Austria), which geographically includes the wine areas Weinviertel, Wachau, Kremstal, Kamptal, Traisental, Donauland, Carnuntum, and Thermenregion;

Burgenland, which geographically includes the wine areas Neusiedlersee, Neusiedlersee-Hügelland, Mittelburgenland, and Südburgenland;

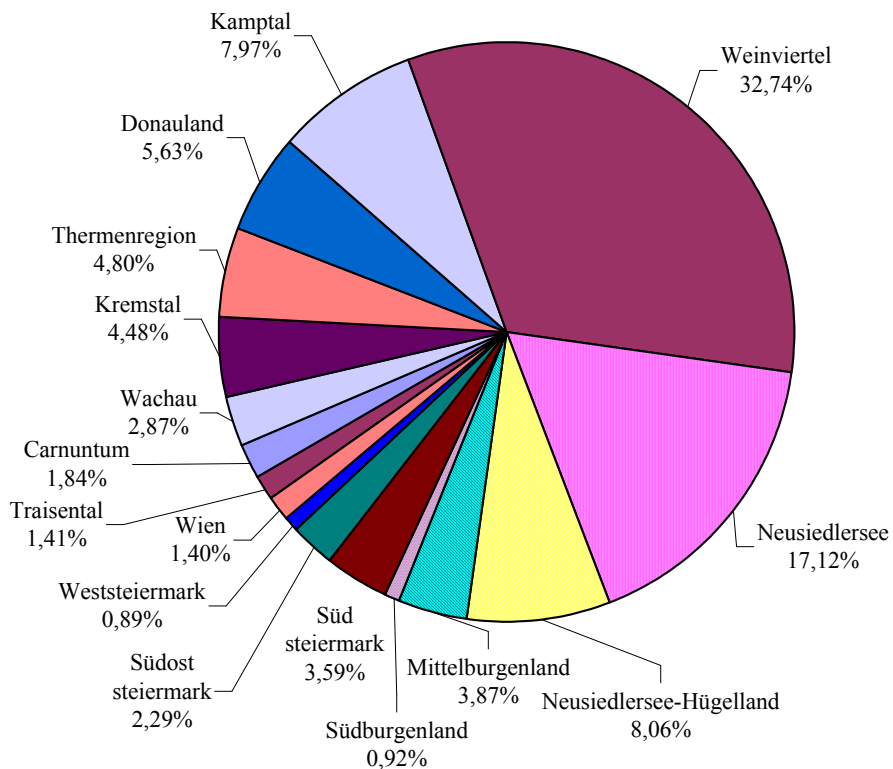
Steiermark, which geographically includes the wine areas Südoststeiermark, Südsteiermark, Weststeiermark;

and Wien.

The Wine-growing Regions



The Wine-growing Areas



Wine-growing Area Lower Austria: 61.8 %
 Wine-growing Area Lower Burgenland: 29.9 %

Lower Austria without wine growing-area: 0.08 %
 Styria without wine growing-area: 0.0005 %
 other federal states: 0.04 %

Vineyard Areas 1999

Final Results (areas in hectares)

Name	Total Vineyards		Vineyard Area by Potential Yield				
			Productive		Not Yet Productive		Total Planted Area
	holdings	area	white wine	red wine	white wine	red wine	
AUSTRIA	32,044	48,557.67	34,851.23	11,636.88	1,293.27	714.75	48,496.13
Wine-growing regions:							
Weinland	27,692	44,567.53	32,003.99	10,688.52	1,133.67	687.95	44,514.15
Steiermark	3,821	3,290.83	2,291.44	846.81	129.15	15.27	3,282.67
Wien	497	678.30	545.27	93.42	29.19	10.42	678.30
Bergland	34	21.01	10.53	8.12	1.25	1.11	21.01
BURGENLAND	9,654	14,563.62	8,958.03	4,935.28	298.64	347.54	14,539.49
Wine-growing areas:							
Neusiedlersee	3,268	8,326.34	5,974.32	1,890.30	230.63	209.61	8,304.85
Neusiedlersee-Hügelland	3,652	3,911.55	2,404.32	1,396.66	50.53	59.68	3,911.18
Mittelburgenland	1,098	1,877.24	334.15	1,471.56	7.44	61.82	1,874.97
Südburgenland	1,636	448.49	245.25	176.76	10.04	16.44	448.49
NIEDERÖSTERREICH	18,038	30,003.91	23,045.96	5,753.25	835.04	340.41	29,974.66
Wine-growing areas:							
Thermenregion	1,282	2,332.30	1,379.47	861.70	46.08	38.32	2,325.57
Kremstal	1,397	2,175.87	1,809.05	285.86	56.94	18.92	2,170.77
Kamptal	1,491	3,868.87	3,151.77	561.63	111.69	41.92	3,867.00
Donauland	1,710	2,731.96	2,221.60	428.01	51.39	29.65	2,730.65
Traisental	706	682.54	570.07	89.37	16.22	6.46	682.12
Carnuntum	745	891.53	554.43	264.32	30.46	42.32	891.53
Wachau	867	1,390.33	1,193.46	151.46	39.92	5.38	1,390.23
Weinviertel	9,774	15,892.24	12,131.02	3,107.72	482.34	157.44	15,878.52
Outside wine-growing area	66	38.26	35.08	3.18	-	-	38.26
STEIERMARK	3,821	3,290.83	2,291.44	846.81	129.15	15.27	3,282.67
Wine-growing areas:							
Südsteiermark	1,066	1,741.04	1,355.67	276.99	98.45	7.84	1,738.95
Weststeiermark	491	432.85	55.33	371.90	3.10	1.53	431.85
Südoststeiermark	2,254	1,115.16	879.46	197.27	27.46	5.90	1,110.09
Outside wine-growing area	10	1.78	0.98	0.64	0.15	-	1.78
WIEN	497	678.30	545.27	93.42	29.19	10.42	678.30
other provinces	34	21.01	10.53	8.12	1.25	1.11	21.01

Analysis of the viticultural land register of the wine-producing provinces
 Minor discrepancies are due to rounding

Source: Statistics Austria

Area under vines 1999

Final Result (area in hectares)

Name	Planted Vineyard Area by Age of Vines				Nurseries ¹⁾
	Under 3 years	3 to 9 years	10 to 19 years	20 years old and older	
AUSTRIA	2,008.02	7,096.28	13,955.24	25,436.59	61.54
Wine-growing regions:					
Weinland	1,821.63	6,129.78	12,641.18	23,921.57	53.38
Steiermark	144.43	779.87	1,149.49	1,208.89	8.16
Wien	39.61	179.33	156.81	302.55	-
Bergland	2.36	7.30	7.76	3.59	-
BURGENLAND	646.18	2,146.41	4,549.89	7,197.01	24.13
Wine-growing areas:					
Neusiedlersee	440.24	1,283.85	2,814.65	3,766.11	21.49
Neusiedlersee-Hügelland	110.21	549.93	1,230.04	2,021.00	0.37
Mittelburgenland	69.26	270.76	408.39	1,126.56	2.27
Südburgenland	26.48	41.86	96.82	283.33	-
NIEDERÖSTERREICH	1,175.45	3,983.36	8,091.29	16,724.56	29.25
Wine-growing areas:					
Thermenregion	84.40	370.00	740.90	1,130.28	6.73
Kremstal	75.86	272.80	456.38	1,365.73	5.10
Kamptal	153.60	530.84	739.09	2,443.46	1.87
Donauland	81.04	265.00	430.59	1,954.02	1.31
Traisental	22.67	52.47	72.32	534.65	0.42
Carnuntum	72.78	153.13	261.02	404.60	-
Wachau	45.30	147.95	156.70	1,040.28	0.10
Weinviertel	639.78	2,189.12	5,227.47	7,822.15	13.72
Outside wine-growing areas	-	2.04	6.83	29.39	-
STEIERMARK	144.43	779.87	1,149.49	1,208.89	8.16
Wine-growing areas:					
Südsteiermark	106.29	429.51	601.22	601.94	2.09
Weststeiermark	4.62	126.69	174.11	126.43	1.00
Südoststeiermark	33.37	223.68	373.39	479.66	5.07
Outside wine-growing areas	0.15	-	0.77	0.86	-
Wine-growing area WIEN	39.61	179.33	156.81	302.55	-
other provinces	2.36	7.30	7.76	3.59	-

Analysis of the viticultural land register of the wine-producing provinces

¹⁾ Federal Ministry for Agriculture and Forestry, Environment and Water Management
 Minor discrepancies are due to rounding.

Source: Statistics Austria

Grape Varieties by Provinces (areas in hectares)

Name	Austria	Burgenland	Nieder- österreich	Steiermark	Wien	Other provinces
white wine:						
Bouvier	364.93	336.79	25.14	1.87	1.13	-
Frühroter Veltliner (Malvasier)	625.78	67.17	551.58	0.03	7.01	-
Furmint	1.16	0.81	0.35	-	-	-
Goldburger	308.55	205.42	44.14	51.92	7.07	-
Grauer Burgunder (Pinot Gris, Ruländer)	292.57	174.73	45.36	65.94	6.41	0.13
Grüner Veltliner (Weissgipfler)	17,479.30	2,735.82	14,538.44	5.49	197.86	1.68
Jubiläumsrebe	30.28	25.08	5.19	-	-	-
Müller-Thurgau (Riesling x Sylvaner, Rivaner)	3,289.27	796.80	2,115.70	350.73	24.14	1.91
Muskateller (Gelber Muskateller, Roter Muskateller)	143.29	12.21	41.30	85.74	3.04	1.00
Muskat-Ottonel	418.17	322.76	87.70	4.67	3.04	-
Neuburger	1,093.85	440.15	637.42	0.26	16.01	-
Roter Veltliner	257.67	3.18	253.02	-	1.47	-
Rotgipfler	118.42	1.80	114.03	-	2.59	-
Sauvignon Blanc (Muskat-Sylvaner)	314.39	54.77	73.17	177.84	8.54	0.08
Scheurebe (Seedling 88)	529.46	290.58	57.28	180.07	1.53	-
Sylvaner (Grüner Sylvaner)	52.61	4.48	33.63	10.53	3.96	-
Traminer (Gewürztraminer, Roter Traminer)	362.87	187.76	94.72	72.24	7.83	0.32
Weisser Burgunder (Weissburgunder, Pinot Blanc, Klevner) and Chardonnay (Feinburgunder, Morillon)	2,935.53	1,043.47	1,235.51	567.22	84.86	4.48
Weisser Riesling (Riesling, Rhine Riesling)	1,642.99	162.85	1,317.80	73.91	88.17	0.26
Welschriesling	4,323.05	1,973.89	1,619.29	696.28	32.06	1.53
Zierfandler (Spätrot)	98.24	0.68	96.58	-	0.98	-
Other white wine varieties	91.22	23.50	33.47	31.07	3.01	0.16
<i>Gemischter Satz (mixed grapes from the same vineyard)</i>	1,370.91	391.99	860.17	44.77	73.75	0.23
total	36,144.50	9,256.67	23,881.00	2,420.59	574.46	11.78
red wine						
Blauburger	883.95	178.36	672.13	21.96	10.91	0.59
Blauer Burgunder (Blauer Spätburgunder, Blauburgunder, Pinot Noir)	408.93	181.17	207.57	5.35	12.39	2.45
Blauer Portugieser	2,358.18	43.66	2,297.68	4.93	11.10	0.82
Blauer Wildbacher (Schilcher)	464.11	3.12	0.20	460.72	0.07	-
Blaufränkisch	2,640.61	2,493.22	124.24	17.32	5.13	0.69
Cabernet Franc	27.11	17.73	8.46	0.48	0.45	-
Cabernet Sauvignon	311.65	189.23	105.78	6.72	9.13	0.80
Merlot	111.76	45.97	61.19	1.06	3.49	0.05
St. Laurent	415.07	184.56	216.60	5.63	7.48	0.79
Zweigelt (Blauer Zweigelt, Rotburger)	4,349.73	1,875.22	2,104.55	330.62	38.20	1.13
Other red wine varieties	22.43	13.70	0.77	7.28	-	0.68
<i>Gemischter Satz (mixed grapes from the same vineyard)</i>	358.10	56.87	294.49	0.02	5.49	1.23
total	12,351.63	5,282.82	6,093.66	862.08	103.84	9.23

Analysis of the viticultural land register of the wine-producing provinces
 Minor discrepancies are due to rounding

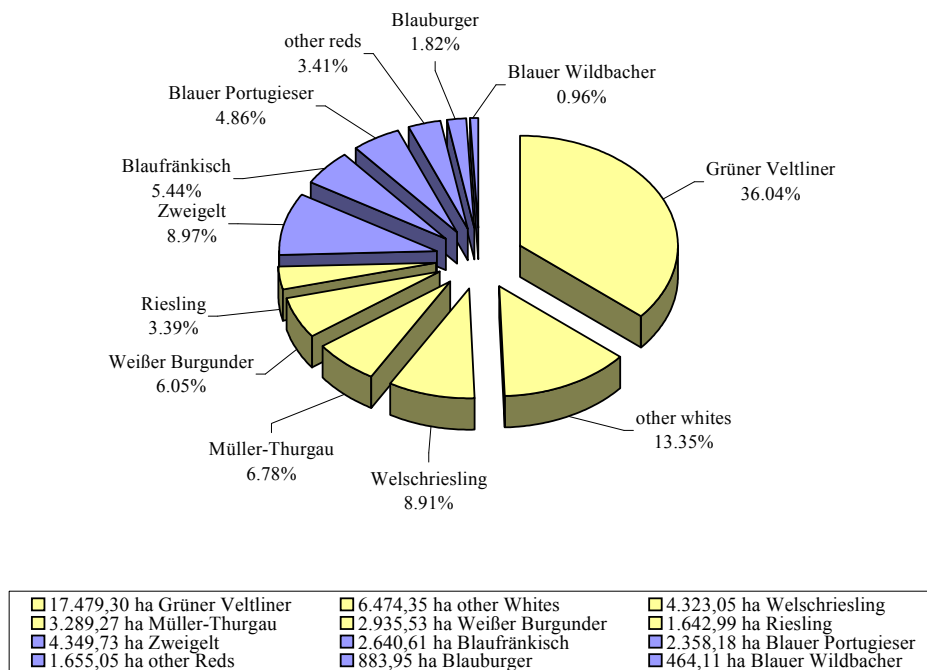
Source: Statistics Austria

1.2 Grape Varieties in Austria

1.2.1 Breakdown by Share of Area in Percent

Austrian Totals

Vineyard Area measured in hectares sorted by grape variety

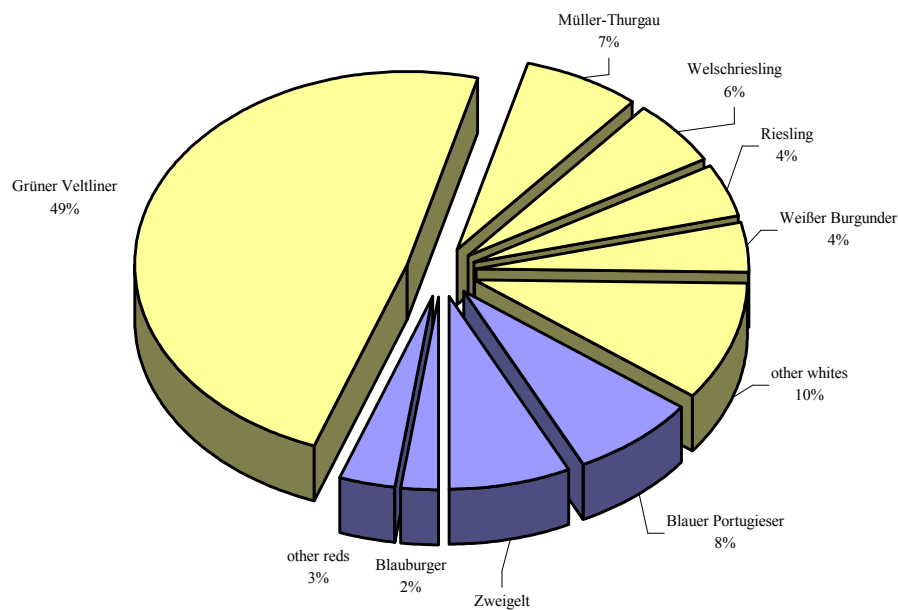


Wine growing area Niederösterreich

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>24,264.11</u>	<u>Total black grape area</u>	<u>6,151.07</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Grüner Veltliner	14,800.83	Blauer Portugieser	2,303.90
Müller-Thurgau	2,132.50	Zweigelt	2,134.55
Welschriesling	1,681.51	Blauburger	686.92
Riesling	1,326.35	Gemischter Satz	295.29
Weißer Burgunder	1,251.10	St. Laurent	217.68
Gemischter Satz	867.89	Blauer Burgunder	209.76
Neuburger	631.77	Blaufränkisch	124.50
Frühroter Veltliner	558.75	Cabernet Sauvignon	107.41
Roter Veltliner	253.06	Merlot	61.62
Rotgipfler	113.13	Cabernet Franc	8.46
Traminer	97.53	Schilcher	0.20
Zierfandler	96.14	others	0.77
Muskat-Ottonel	89.69		
Sauvignon blanc	73.44		
Scheurebe	60.07		
Grauer Burgunder	45.35		
Goldburger	45.12		
Muskateller	41.93		
Sylvaner	33.62		
others	34.23		

The major grape varieties according to area

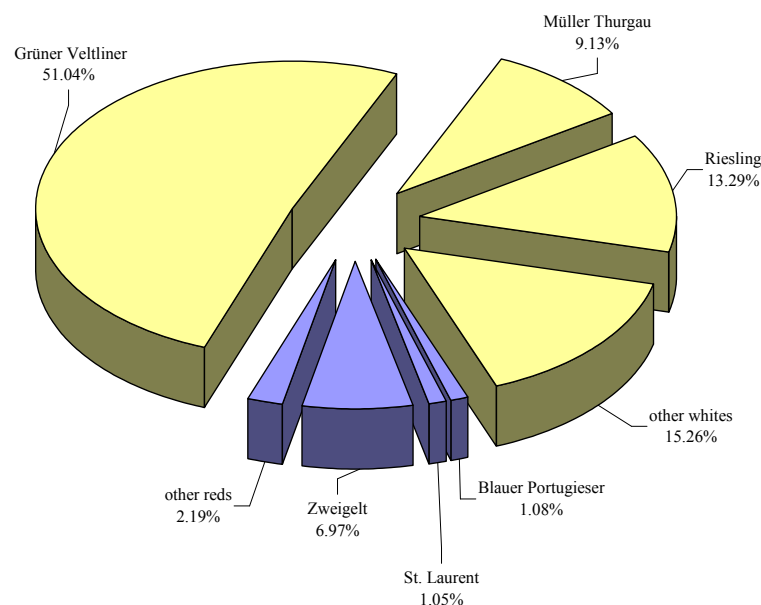


Wine growing area Wachau

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>1,233.38</u>	<u>Total black grape area</u>	<u>156.84</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Grüner Veltliner	709.56	Zweigelt	96.85
Riesling	184.70	Blauer Portugieser	14.96
Müller-Thurgau	126.94	St. Laurent	14.61
Neuburger	80.50	Blauburger	11.27
Weißer Burgunder	64.41	Gemischter Satz	10.66
Gemischter Satz	28.75	Blauer Burgunder	5.36
Frühroter Veltliner	20.04	Blaufränkisch	1.56
Muskateller	5.72	Cabernet Sauvignon	0.88
Muskat-Ottonel	3.50	Merlot	0.53
Sauvignon blanc	2.13	Schilcher	0.00
Grauer Burgunder	2.05	Cabernet Franc	0.00
Traminer	1.92	others	0.16
Roter Veltliner	1.52		
Sylvaner	0.77		
Jubiläumsrebe	0.27		
Bouvier	0.25		
Goldburger	0.10		
Zierfandler	0.09		
Rotgipfler	0.06		
Welschriesling	0.04		
others	0.05		

The major grape varieties according to area

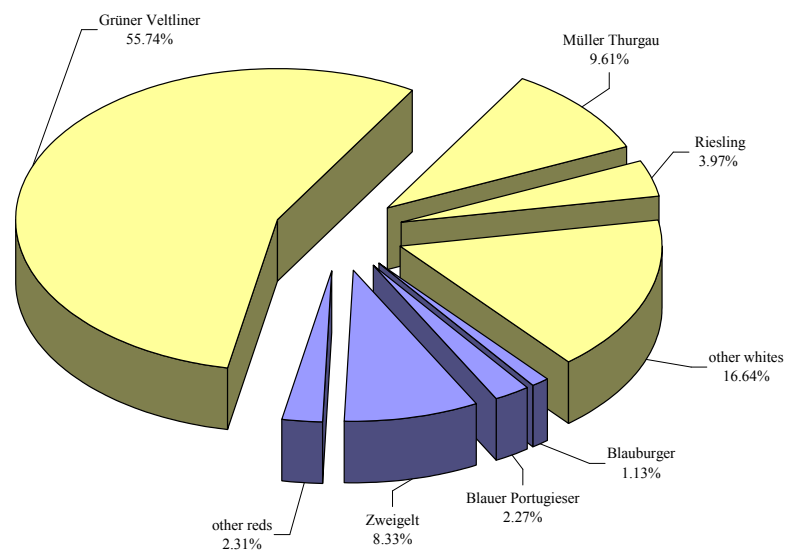


Wine growing area Kremstal

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>1,865.99</u>	<u>Total black grape area</u>	<u>304.78</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Grüner Veltliner	1,209.96	Zweigelt	180.84
Müller-Thurgau	208.52	Blauer Portugieser	49.24
Riesling	186.19	Blauburger	24.58
Weißer Burgunder	68.38	Blauer Burgunder	15.15
Neuburger	55.80	Gemischter Satz	13.62
Gemischter Satz	38.97	St. Laurent	11.84
Frühroter Veltliner	36.03	Cabernet Sauvignon	4.45
Roter Veltliner	19.52	Merlot	2.88
Welschriesling	11.74	Cabernet Franc	1.51
Muskat-Ottonel	7.92	Blaufränkisch	0.68
Sauvignon blanc	6.87	Schilcher	0.00
Muskateller	4.82	others	0.00
Traminer	2.32		
Sylvaner	2.11		
Bouvier	1.78		
Goldburger	1.50		
Grauer Burgunder	1.48		
Scheurebe	0.85		
Zierfandler	0.34		
Rotgipfler	0.17		
Jubiläumsrebe	0.13		
others	0.58		

The major grape varieties according to area

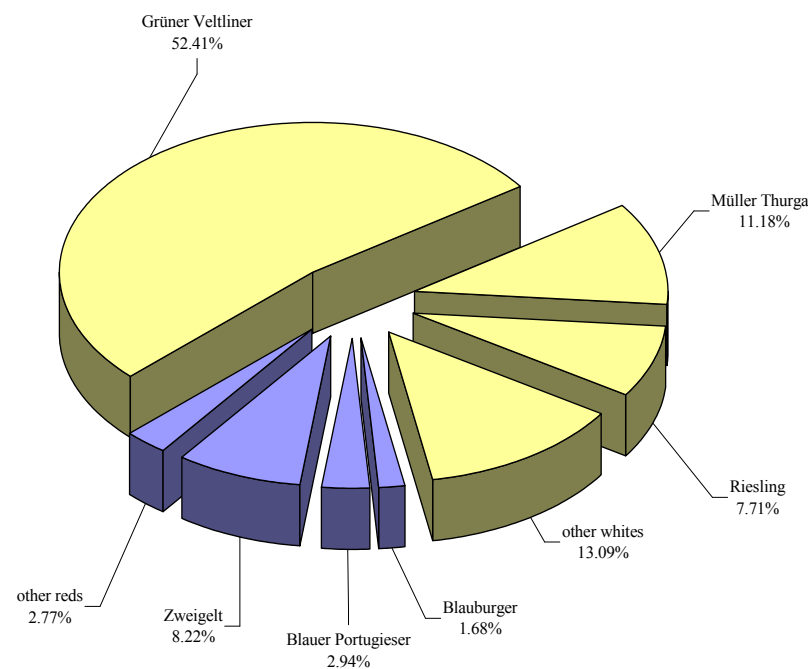


Wine growing area Kamptal

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>3.263.46</u>	<u>Total black grape area</u>	<u>603.54</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Grüner Veltliner	2,026.63	Zweigelt	317.77
Müller-Thurgau	432.50	Blauer Portugieser	113.73
Riesling	297.96	Blauburger	64.98
Weißer Burgunder	144.62	St. Laurent	36.43
Frühroter Veltliner	81.08	Blauer Burgunder	30.67
Welschriesling	76.28	Gemischter Satz	20.69
Gemischter Satz	54.23	Cabernet Sauvignon	8.78
Neuburger	44.70	Merlot	6.69
Roter Veltliner	33.09	Blaufränkisch	2.99
Sauvignon blanc	22.64	Cabernet Franc	0.81
Muskat-Ottonel	9.64	Schilcher	0.00
Scheurebe	8.00	others	0.00
Muskateller	6.80		
Traminer	6.80		
Grauer Burgunder	6.53		
Sylvaner	4.91		
Bouvier	4.34		
Goldburger	0.73		
Rotgipfler	0.45		
Zierfandler	0.34		
Jubiläumsrebe	0.17		
others	1.01		

The major grape varieties according to area

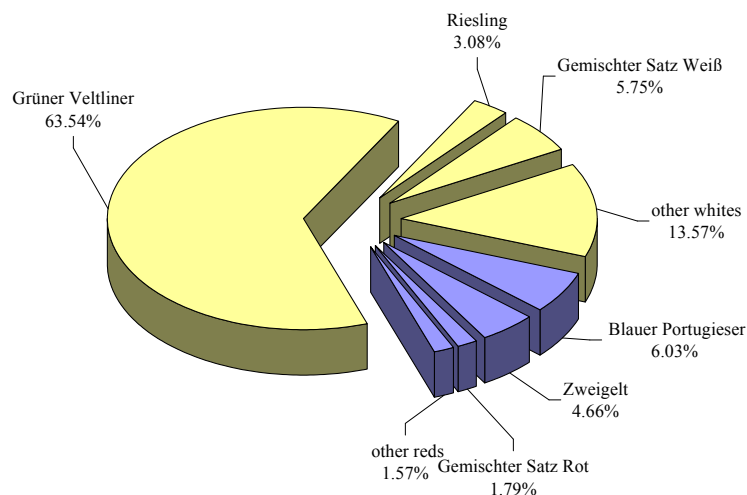


Wine growing area Traisental

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>586.29</u>	<u>Total black grape area</u>	<u>95.83</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Grüner Veltliner	433.45	Blauer Portugieser	41.15
Gemischter Satz	39.23	Zweigelt	31.81
Müller-Thurgau	33.40	Gemischter Satz	12.19
Riesling	21.04	Blauburger	4.87
Neuburger	14.50	St. Laurent	2.84
Weißer Burgunder	12.55	Blauer Burgunder	1.56
Frühroter Veltliner	11.96	Blaufränkisch	0.65
Roter Veltliner	4.64	Cabernet Sauvignon	0.55
Sauvignon blanc	3.41	Merlot	0.17
Sylvaner	2.24	Cabernet Franc	0.03
Welschriesling	1.88	Schilcher	0.00
Bouvier	1.85	others	0.00
Muskat-Ottonel	1.83		
Muskateller	1.27		
Traminer	1.26		
Grauer Burgunder	1.20		
Rotgipfler	0.18		
Scheurebe	0.14		
Zierfandler	0.11		
Goldburger	0.10		
Furmint	0.00		
Jubiläumsrebe	0.00		
others	0.05		

The major grape varieties according to area

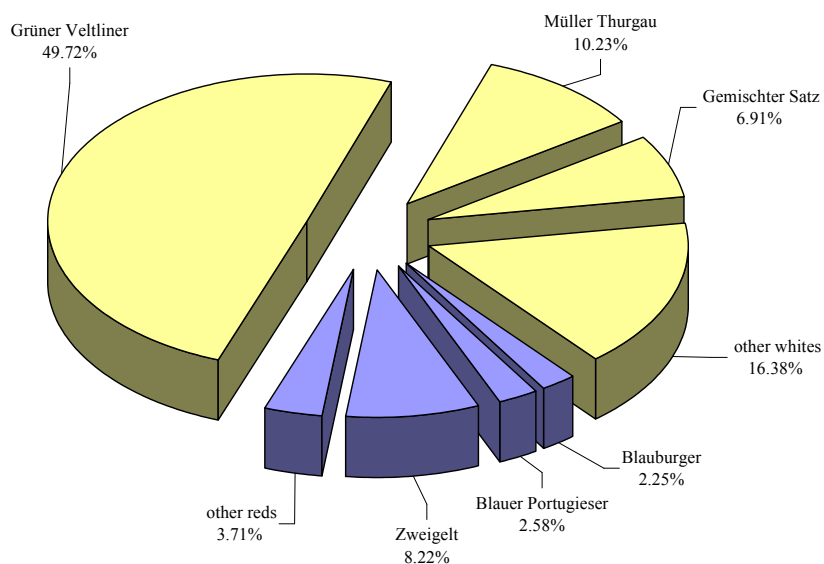


Wine growing area Donauland

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>2,272.99</u>	<u>Total black grape area</u>	<u>457.66</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Grüner Veltliner	1,357.67	Zweigelt	224.58
Müller-Thurgau	279.40	Blauer Portugieser	70.38
Gemischter Satz	188.61	Blauburger	61.47
Weißer Burgunder	97.59	Gemischter Satz	57.26
Frühroter Veltliner	97.58	Blauer Burgunder	22.64
Riesling	85.03	St. Laurent	8.97
Roter Veltliner	82.38	Cabernet Sauvignon	6.25
Welschriesling	23.53	Blaufränkisch	2.79
Traminer	12.24	Merlot	2.68
Zierfandler	8.33	Cabernet Franc	0.48
Neuburger	7.26	Schilcher	0.05
Muskat-Ottonel	6.23	others	0.10
Sylvaner	5.36		
Scheurebe	5.13		
Sauvignon blanc	4.21		
Bouvier	3.18		
Muskateller	3.17		
Goldburger	2.41		
Grauer Burgunder	2.05		
Rotgipfler	0.35		
Jubiläumsrebe	0.28		
Furmint	0.00		
others	1.00		

The major grape varieties according to area



Wine growing area Carnuntum

Vineyard Area measured in hectares sorted by grape variety

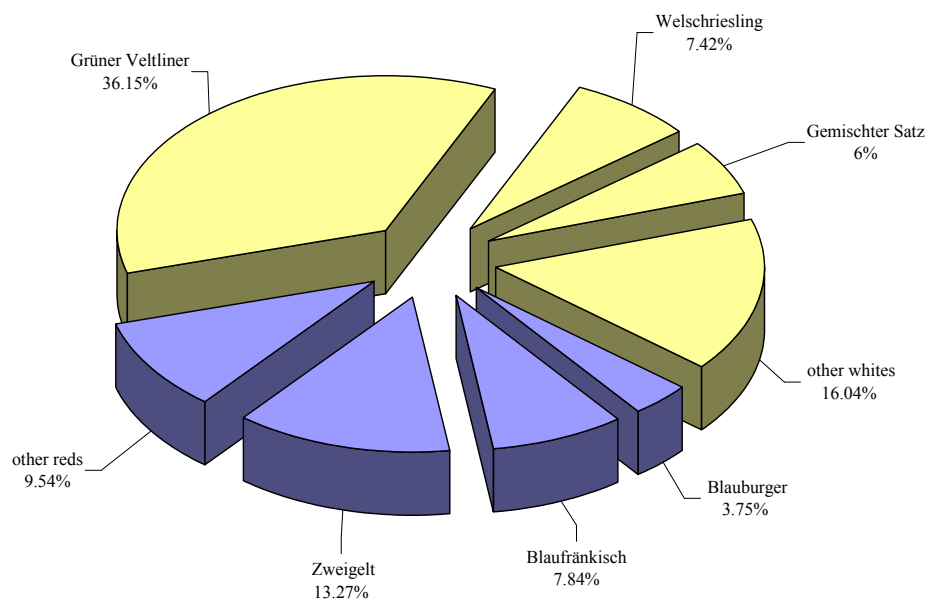
Total white grape area**584.89****Total black grape area****306.64****Varieties:**

Grüner Veltliner	322.27
Welschriesling	66.12
Gemischter Satz	53.48
Weißer Burgunder	49.26
Müller-Thurgau	26.27
Riesling	19.58
Neuburger	7.27
Goldburger	5.15
Sauvignon blanc	4.10
Muskat-Ottonel	4.02
Scheurebe	2.97
Frühroter Veltliner	2.79
Traminer	2.51
Roter Veltliner	1.69
Muskateller	1.16
Bouvier	0.74
Rotgipfler	0.63
Grauer Burgunder	0.53
Sylvaner	0.27
Furmint	0.00
Jubiläumsrebe	0.00
Zierfandler	0.00
others	14.09

Varieties:

Zweigelt	118.31
Blaufränkisch	69.88
Blauburger	33.43
Blauer Portugieser	27.01
Gemischter Satz	20.10
Cabernet Sauvignon	13.96
St. Laurent	10.86
Merlot	7.00
Blauer Burgunder	5.47
Cabernet Franc	0.62
Schilcher	0.00
others	0.00

The major grape varieties according to area

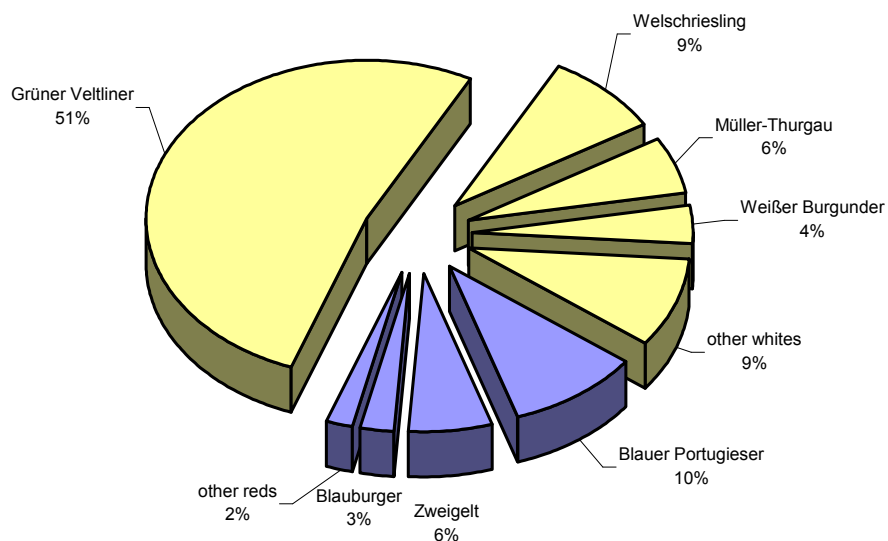


Wine growing area Weinviertel

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>13,033.29</u>	<u>Total black grape area</u>	<u>3,325.76</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Grüner Veltliner	8,543.30	Blauer Portugieser	1,606.46
Welschriesling	1,413.61	Zweigelt	975.15
Müller-Thurgau	964.77	Blauburger	430.98
Weißer Burgunder	606.56	Gemischter Satz	136.40
Riesling	439.97	Blauer Burgunder	47.55
Gemischter Satz	404.09	St. Laurent	44.90
Frühroter Veltliner	266.84	Cabernet Sauvignon	35.71
Roter Veltliner	108.37	Merlot	25.76
Neuburger	66.17	Blaufränkisch	21.31
Scheurebe	40.55	Cabernet Franc	1.03
Traminer	35.62	Schilcher	0.00
Muskat-Ottonel	31.85	others	0.51
Sauvignon blanc	23.96		
Goldburger	22.21		
Grauer Burgunder	16.15		
Muskateller	14.09		
Bouvier	8.99		
Sylvaner	8.80		
Jubiläumsrebe	2.63		
Zierfandler	1.90		
Rotgipfler	1.59		
Furmint	0.35		
others	9.94		

The major grape varieties according to area

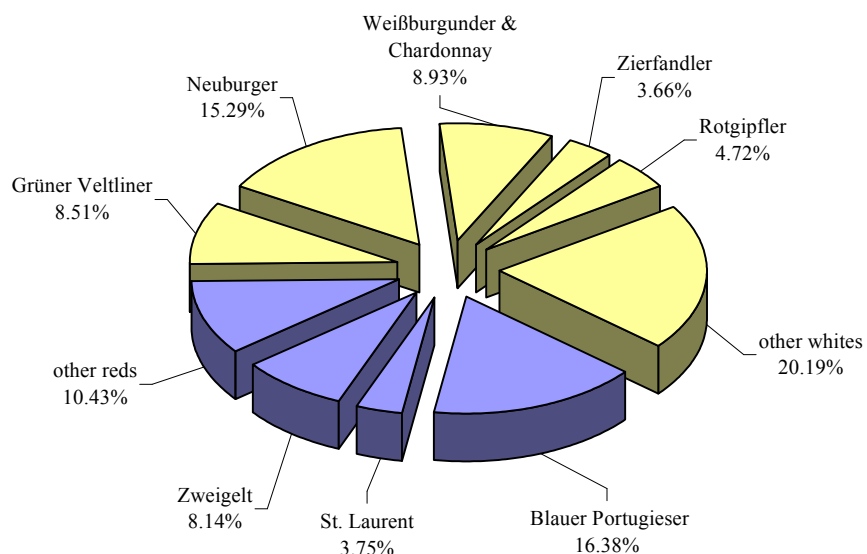


Wine growing area Thermenregion

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>1.425.55</u>	<u>Total black grape area</u>	<u>900.02</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Neuburger	355.57	Blauer Portugieser	380.97
Weißer Burgunder	207.73	Zweigelt	189.24
Grüner Veltliner	197.99	St. Laurent	87.23
Rotgipfler	109.70	Blauer Burgunder	81.36
Riesling	91.88	Blauburger	55.34
Welschriesling	88.31	Cabernet Sauvignon	36.83
Zierfandler	85.03	Blaufränkisch	24.64
Müller-Thurgau	60.70	Gemischter Satz	24.37
Gemischter Satz	60.53	Merlot	15.91
Frühroter Veltliner	42.43	Cabernet Franc	3.98
Traminer	34.86	Schilcher	0.15
Muskat-Ottonel	24.70	others	0.00
Grauer Burgunder	15.36		
Goldburger	12.92		
Sylvaner	9.16		
Sauvignon blanc	6.12		
Muskateller	4.90		
Bouvier	4.17		
Scheurebe	2.43		
Roter Veltliner	1.85		
Jubiläumsrebe	1.71		
Furmint	0.00		
others	7.51		

The major grape varieties according to area

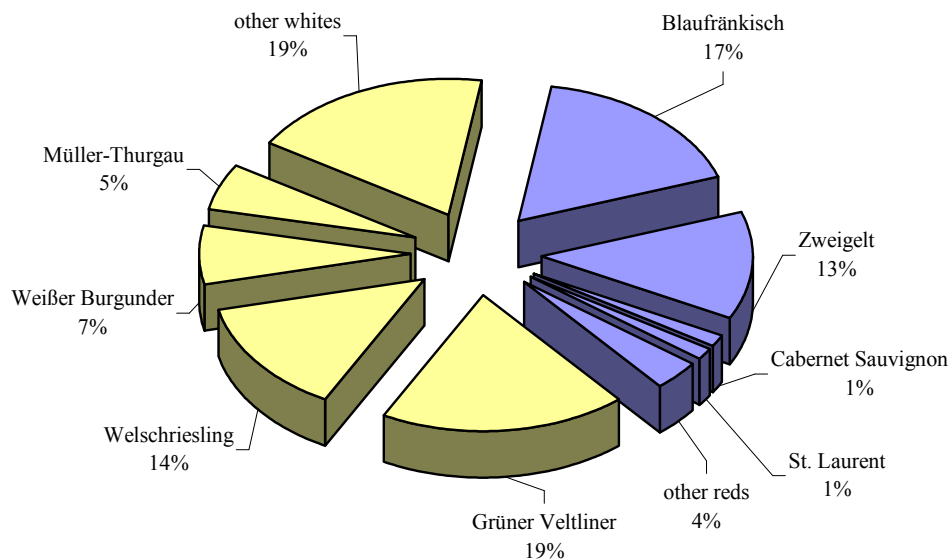


Wine growing area Burgenland

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>9,256.67</u>	<u>Total black grape area</u>	<u>5,282.82</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Grüner Veltliner	2,735.81	Blafränkisch	2,493.23
Welschriesling	1,973.88	Zweigelt	1,875.22
Weißer Burgunder	1,043.47	Cabernet Sauvignon	189.23
Müller-Thurgau	796.8	St. Laurent	184.56
Neuburger	440.16	Blauer Burgunder	181.18
Gemischter Satz	391.99	Blauburger	178.37
Bouvier	336.78	Gemischter Satz	56.88
Muskat-Ottonel	322.75	Merlot	45.98
Scheurebe	290.58	Blauer Portugieser	43.65
Goldburger	205.42	Cabernet Franc	17.72
Traminer	187.76	Schilcher	3.13
Grauer Burgunder	174.74	others	13.69
Riesling	162.85		
Frühroter Veltliner	67.17		
Sauvignon blanc	54.77		
Jubiläumsrebe	25.09		
Muskateller	12.2		
Sylvaner	4.48		
Roter Veltliner	3.18		
Rotgipfler	1.8		
Furmint	0.81		
Zierfandler	0.68		
others	23.49		

The major grape varieties according to area

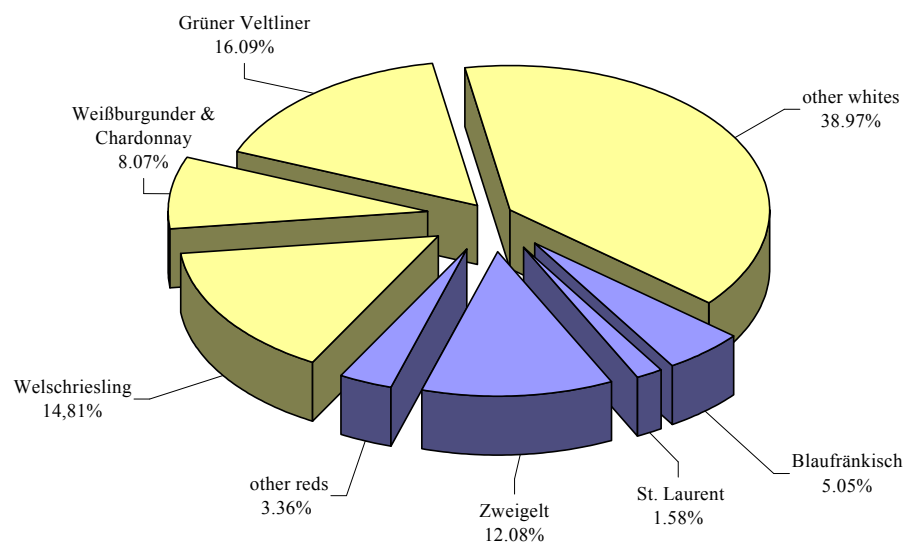


Wine growing area Neusiedlersee

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>6,204.95</u>	<u>Total black grape area</u>	<u>2,099.90</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Grüner Veltliner	1,531.01	Zweigelt	1,149.36
Welschriesling	1,409.06	Blaufränkisch	480.42
Weißer Burgunder	768.27	St. Laurent	150.69
Müller-Thurgau	511.90	Blauburger	105.68
Neuburger	338.42	Blauer Burgunder	88.97
Bouvier	308.12	Cabernet Sauvignon	83.60
Scheurebe	264.63	Merlot	18.26
Muskat-Ottonel	247.59	Gemischter Satz	7.88
Grauer Burgunder	164.23	Cabernet Franc	3.83
Traminer	143.31	Blauer Portugieser	3.45
Goldburger	139.34	Schilcher	3.09
Gemischter Satz	131.12	others	4.68
Riesling	114.08		
Frühroter Veltliner	52.87		
Sauvignon blanc	34.40		
Jubiläumsrebe	22.54		
Muskateller	8.50		
Sylvaner	2.46		
Roter Veltliner	2.19		
Rotgipfler	1.67		
Zierfandler	0.68		
Furmint	0.55		
others	7.99		

The major grape varieties according to area

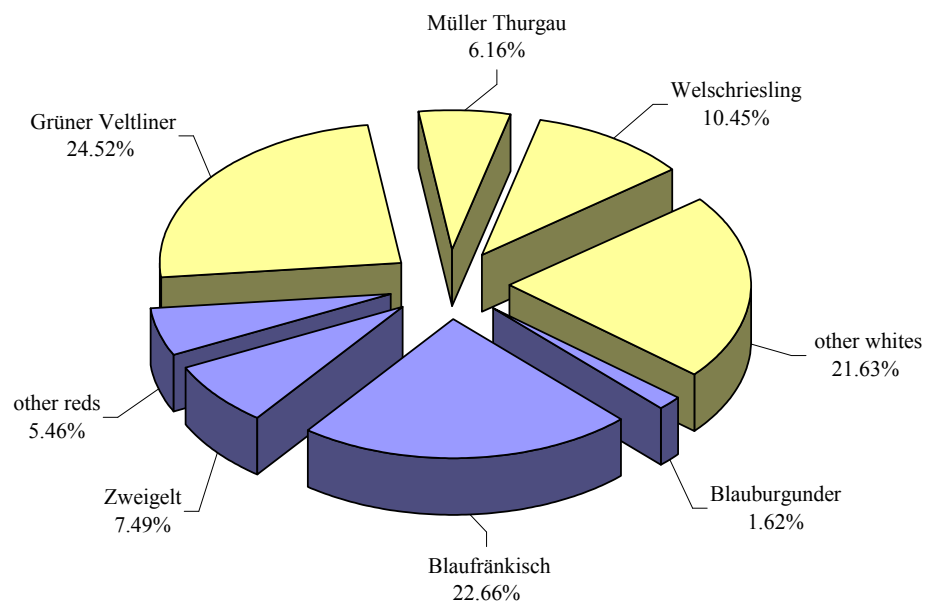


Wine growing area Neusiedlersee-Hügelland

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>2,454.84</u>	<u>Total black grape area</u>	<u>1,456.34</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Grüner Veltliner	958.94	Blaufränkisch	886.44
Welschriesling	408.89	Zweigelt	292.94
Müller-Thurgau	240.87	Blauer Burgunder	63.54
Weißer Burgunder	233.84	Cabernet Sauvignon	52.96
Gemischter Satz	209.06	Blauburger	44.28
Neuburger	100.80	Gemischter Satz	37.36
Muskat-Ottonel	71.88	Blauer Portugieser	33.16
Goldburger	56.22	St. Laurent	21.73
Traminer	42.31	Cabernet Franc	12.15
Bouvier	27.75	Merlot	10.15
Riesling	27.68	Schilcher	0.00
Scheurebe	20.21	others	1.62
Sauvignon blanc	16.45		
Frühroter Veltliner	14.30		
Grauer Burgunder	9.53		
Muskateller	3.35		
Jubiläumsrebe	2.55		
Sylvaner	1.59		
Roter Veltliner	0.78		
Furmint	0.26		
Rotgipfler	0.13		
Zierfandler	0.00		
others	7.46		

The major grape varieties according to area

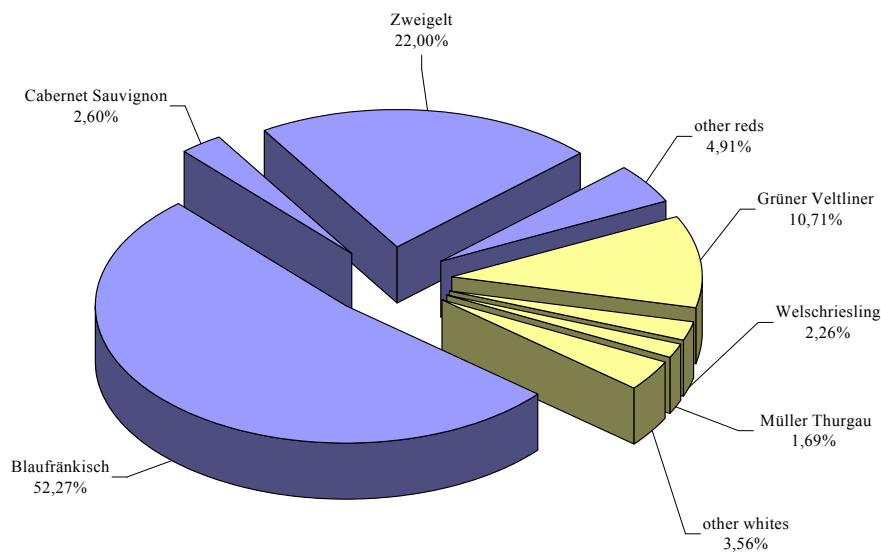


Wine growing area Mittelburgenland

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>341.59</u>	<u>Total black grape area</u>	<u>1,533.38</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Grüner Veltliner	200.72	Blaufränkisch	980.07
Welschriesling	42.46	Zweigelt	412.47
Müller-Thurgau	31.72	Cabernet Sauvignon	48.74
Weißer Burgunder	29.93	Blauburger	23.25
Gemischter Satz	11.45	Blauer Burgunder	22.16
Riesling	7.68	Merlot	16.00
Goldburger	4.47	St. Laurent	11.84
Sauvignon blanc	3.40	Gemischter Satz	5.10
Scheurebe	3.39	Blauer Portugieser	4.85
Muskat-Ottonel	2.96	Cabernet Franc	1.53
Traminer	0.91	Schilcher	0.00
Grauer Burgunder	0.66	others	7.39
Bouvier	0.40		
Neuburger	0.38		
Roter Veltliner	0.21		
Muskateller	0.12		
Sylvaner	0.09		
Frühroter Veltliner	0.00		
Furmint	0.00		
Jubiläumsrebe	0.00		
Rotgipfler	0.00		
Zierfandler	0.00		
others	0.65		

The major grape varieties according to area

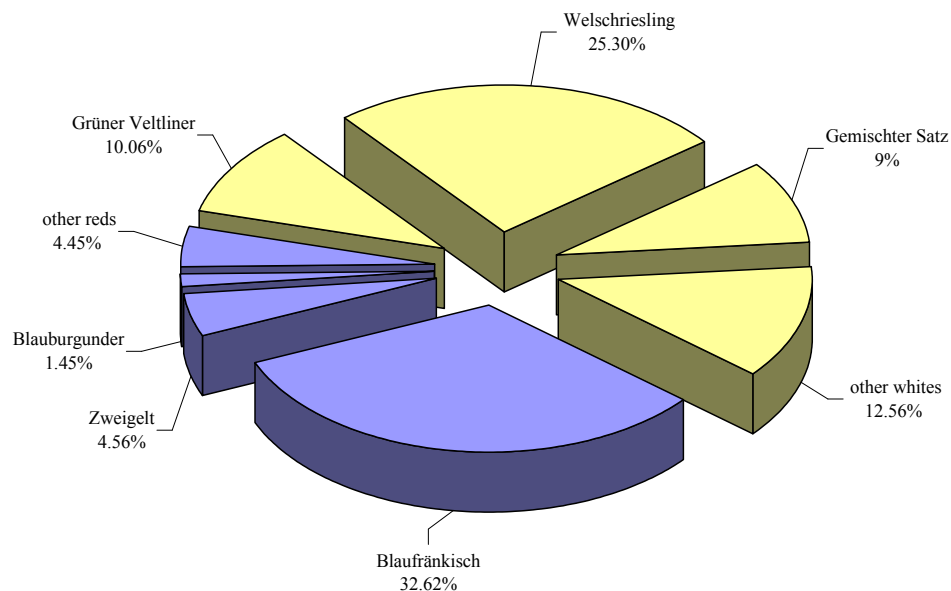


Wine growing area Südburgenland

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>255.29</u>	<u>Total black grape area</u>	<u>193.20</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Welschriesling	113.47	Blaufränkisch	146.30
Grüner Veltliner	45.14	Zweigelt	20.45
Gemischter Satz	40.36	Gemischter Satz	6.54
Riesling	13.41	Blauer Burgunder	6.51
Müller-Thurgau	12.31	Blauburger	5.16
Weißer Burgunder	11.43	Cabernet Sauvignon	3.93
Goldburger	5.39	Blauer Portugieser	2.19
Scheurebe	2.35	Merlot	1.57
Traminer	1.23	St. Laurent	0.30
Neuburger	0.56	Cabernet Franc	0.21
Sauvignon blanc	0.52	Schilcher	0.04
Bouvier	0.51	others	0.00
Sylvaner	0.34		
Muskat-Ottonel	0.32		
Grauer Burgunder	0.32		
Muskateller	0.23		
Frühroter Veltliner	0.00		
Furmint	0.00		
Jubiläumsrebe	0.00		
Roter Veltliner	0.00		
Rotgipfler	0.00		
Zierfandler	0.00		
others	7.39		

The major grape varieties according to area

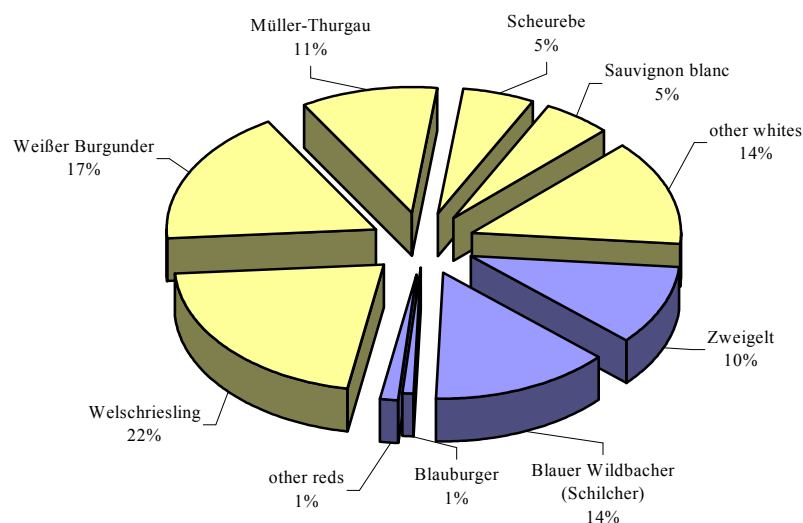


Wine growing area Steiermark

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>2,419.46</u>	<u>Total black grape area</u>	<u>861.45</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Welschriesling	695.91	Blauer Wildbacher (Schilcher)	460.72
Weißer Burgunder	567.15	Zweigelt	330.62
Müller-Thurgau	350.73	Blauburger	21.95
Scheurebe	180.07	Blaufränkisch	16.7
Sauvignon blanc	177.83	Cabernet Sauvignon	6.72
Muskateller	85.74	St. Laurent	5.64
Riesling	73.92	Blauer Burgunder	5.35
Traminer	72.25	Blauer Portugieser	4.92
Grauer Burgunder	65.94	Merlot	1.06
Goldburger	51.92	Cabernet Franc	0.48
Gemischter Satz	44.67	Gemischter Satz	0
Sylvaner	10.53	others	7.29
Grüner Veltliner	5.02		
Muskat-Ottonel	4.59		
Bouvier	1.87		
Neuburger	0.26		
Frühroter Veltliner	0		
Furmint	0		
Jubiläumsrebe	0		
Roter Veltliner	0		
Rotgipfler	0		
Zierfandler	0		
others	31.07		

The major grape varieties according to area

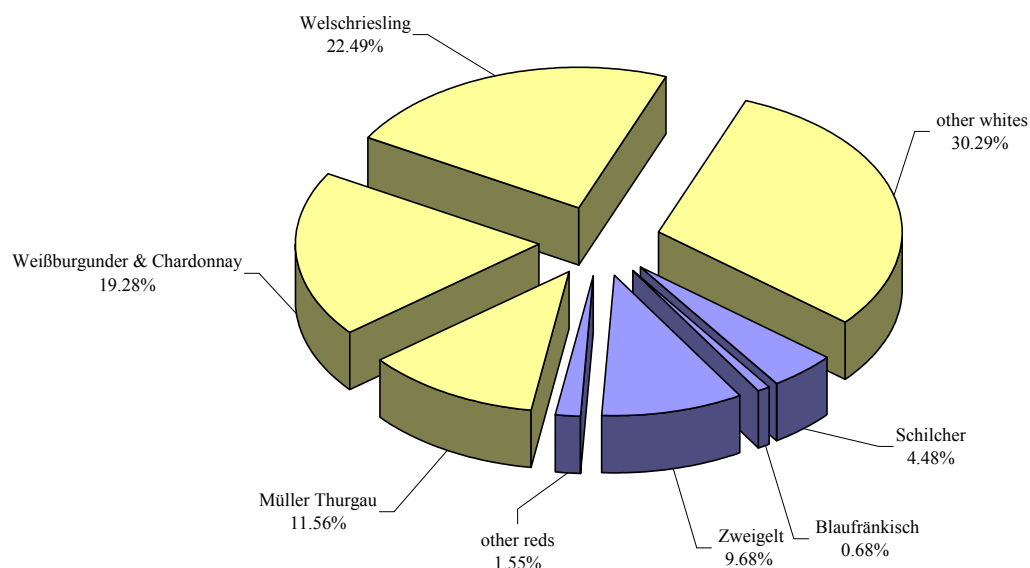


Wine growing area Südsteiermark

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>1,454.11</u>	<u>Total black grape area</u>	<u>284.84</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Welschriesling	391.10	Zweigelt	168.32
Weißer Burgunder	335.33	Blauer Wildbacher (Schilcher)	77.89
Müller-Thurgau	201.01	Blaufränkisch	11.76
Sauvignon blanc	147.43	Blauburger	8.02
Scheurebe	107.35	St. Laurent	4.88
Muskateller	78.94	Blauer Portugieser	4.21
Riesling	46.07	Cabernet Sauvignon	4.05
Grauer Burgunder	43.13	Blauer Burgunder	3.03
Traminer	40.36	Cabernet Franc	0.39
Gemischter Satz	26.88	Merlot	0.00
Sylvaner	8.27	Gemischter Satz	0.00
Goldburger	5.54	others	2.28
Muskat-Ottonel	2.77		
Grüner Veltliner	1.98		
Bouvier	0.95		
Frühroter Veltliner	0.00		
Furmint	0.00		
Jubiläumsrebe	0.00		
Neuburger	0.00		
Roter Veltliner	0.00		
Rotgipfler	0.00		
Zierfandler	0.00		
others	17.01		

The major grape varieties according to area

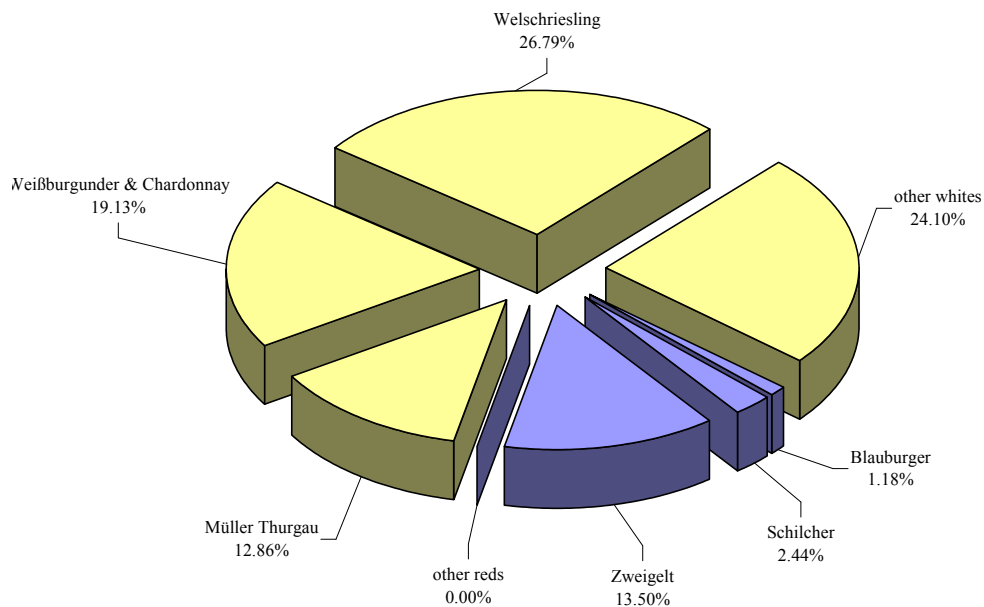


Wine growing area Südoststeiermark

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>906.92</u>	<u>Total black grape area</u>	<u>203.18</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Welschriesling	293.14	Zweigelt	147.78
Weißer Burgunder	209.31	Blauer Wildbacher (Schilcher)	26.73
Müller-Thurgau	140.74	Blauburger	12.95
Scheurebe	71.29	Blaufränkisch	4.11
Goldburger	44.70	Cabernet Sauvignon	2.67
Traminer	31.20	Blauer Burgunder	2.18
Sauvignon blanc	26.68	Merlot	1.06
Riesling	26.00	St. Laurent	0.76
Grauer Burgunder	20.26	Cabernet Franc	0.09
Gemischter Satz	15.80	Blauer Portugieser	0.06
Muskateller	6.65	Gemischter Satz	0.00
Grüner Veltliner	2.97	others	4.80
Muskat-Ottonel	1.82		
Sylvaner	1.33		
Bouvier	0.92		
Neuburger	0.26		
Frühroter Veltliner	0.00		
Furmint	0.00		
Jubiläumsrebe	0.00		
Roter Veltliner	0.00		
Rotgipfler	0.00		
Zierfandler	0.00		
others	13.84		

The major grape varieties according to area

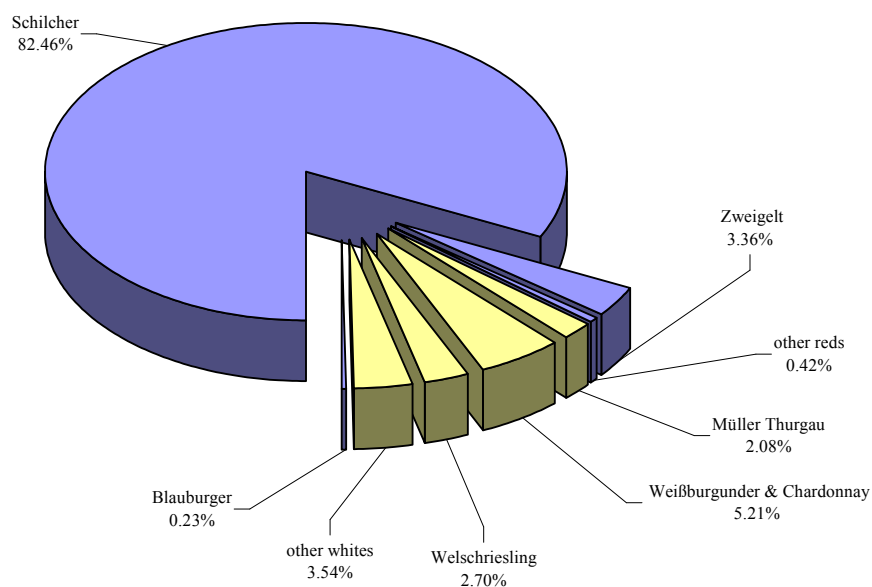


Wine growing area Weststeiermark

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>58.43</u>	<u>Total black grape area</u>	<u>373.43</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Weißer Burgunder	22.51	Blauer Wildbacher (Schilcher)	356.10
Welschriesling	11.67	Zweigelt	14.52
Müller-Thurgau	8.98	Blauburger	0.98
Sauvignon blanc	3.72	Blaufränkisch	0.83
Grauer Burgunder	2.55	Blauer Portugieser	0.65
Gemischter Satz	1.99	Blauer Burgunder	0.14
Riesling	1.85	Cabernet Franc	0.00
Goldburger	1.68	Cabernet Sauvignon	0.00
Scheurebe	1.43	Merlot	0.00
Sylvaner	0.93	St. Laurent	0.00
Traminer	0.69	Gemischter Satz	0.00
Muskateller	0.15	others	0.21
Grüner Veltliner	0.07		
Bouvier	0.00		
Frühroter Veltliner	0.00		
Furmint	0.00		
Jubiläumsrebe	0.00		
Muskat-Ottonel	0.00		
Neuburger	0.00		
Roter Veltliner	0.00		
Rotgipfler	0.00		
Zierfandler	0.00		
others	0.22		

The major grape varieties according to area

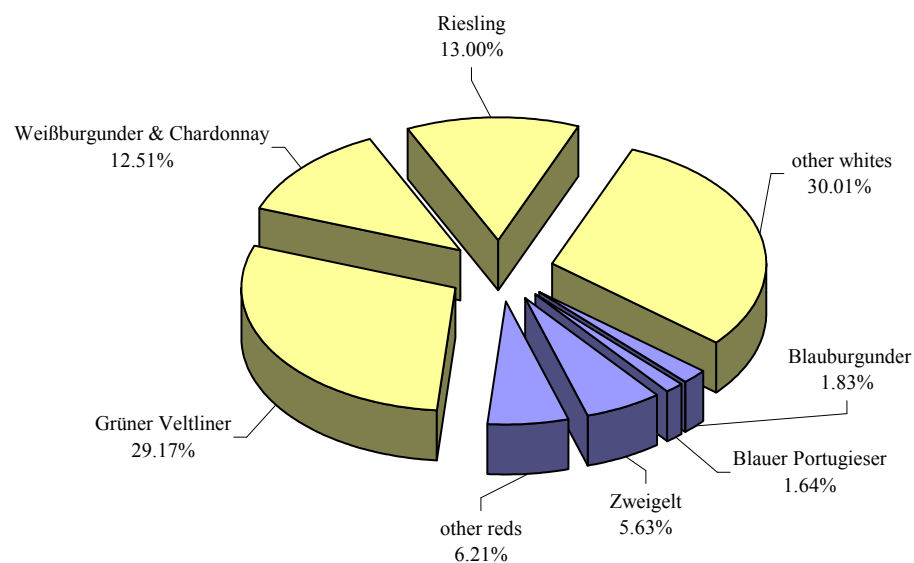


Wine growing area Wien

Vineyard Area measured in hectares sorted by grape variety

<u>Total white grape area</u>	<u>574.46</u>	<u>Total black grape area</u>	<u>103.84</u>
<u>Varieties:</u>		<u>Varieties:</u>	
Grüner Veltliner	197.86	Zweigelt	38.20
Riesling	88.17	Blauer Burgunder	12.39
Weißer Burgunder	84.86	Blauer Portugieser	11.10
Gemischter Satz	73.75	Blauburger	10.91
Welschriesling	32.06	Cabernet Sauvignon	9.13
Müller-Thurgau	24.14	St. Laurent	7.48
Neuburger	16.01	Gemischter Satz	5.49
Sauvignon blanc	8.54	Blaufränkisch	5.13
Traminer	7.83	Merlot	3.49
Goldburger	7.07	Cabernet Franc	0.45
Frühroter Veltliner	7.01	Schilcher	0.07
Grauer Burgunder	6.41	others	0.00
Sylvaner	3.96		
Muskat-Ottonel	3.04		
Muskateller	3.04		
Rotgipfler	2.59		
Scheurebe	1.53		
Roter Veltliner	1.47		
Bouvier	1.13		
Zierfandler	0.98		
Furmint	0.00		
Jubiläumsrebe	0.00		
others	3.01		

The major grape varieties according to area



1.2.2 Grape Varieties – Brief Description

Variety (White)	Cultivated Area (in %)	Important Growing Areas in Austria
Grüner Veltliner 17,479 ha	36.04	Niederösterreich, Burgenland, Wien
Peppery spice, fruity, usually dry. With a share of about a third of Austria's total viticultural area, the Grüner Veltliner is the most important variety grown in Austria. The quality spectrum of the Grüner Veltliner is sweeping, extending from light, effervescent wines that are best drunk young – as "Heuriger" – to <i>Spätlese</i> wines that are rich in extracts and alcohol and thus age particularly well.		
Welschriesling 4,323 ha	8.91	Burgenland, Steiermark, Weinviertel (Eastern part)
Spicy in a refined way, refreshing, fruity. The Welschriesling, which has long been found in Austria's vineyards, is not related to the Riesling (Rhine Riesling). For the most part Welschriesling wines are fresh, fruity and best enjoyed in their youth; but the variety can also produce an outstanding <i>sweet wine</i> with lasting bouquet and raciness.		
Müller-Thurgau (Rivaner) 3,289 ha	6.78	In all wine-growing areas
Slight Muscat flavour, round, soft. This variety owes its name to the Swiss botanist Hermann Müller from the canton of Thurgau. Müller-Thurgau wines are generally low in acidity and round with a slightly Muscat-like bouquet and mild taste. Apart from <i>Prädikat</i> wine, the Müller-Thurgau should preferably be drunk as new wine (vins de primeur).		
Weißburgunder & Chardonnay 2,936 ha	6.05	In all wine-growing areas
Weissburgunder: fine combination of fragrances, powerful, racy. If the grapes have attained full maturity, the Austrian Weissburgunder is a white wine rich in extracts with a fine almond-like taste and piquant acidity. The grape variety known internationally as Pinot Blanc usually develops very well in the bottle. Because of its discreet character it is suitable for blending with other varieties and for ageing in new, small oak barrels (<i>en barrique</i>). Chardonnay: juicy fruit, concentrated, piquant. In Steiermark, where it results in very fresh, slightly flowery wines, it is known as the Morillon. But it is increasingly being grown in Niederösterreich, Burgenland and Wien. Its fragrance is reminiscent of white bread. Its wines are very powerful and rich in extracts and retain a pleasant acidity even after long maturation; it improves further with bottle ageing.		
Riesling 1,643 ha	3.39	Danube (Wachau, Wien and other River Valleys)
Elegant fragrance, fine nuances, raciness. In good vintage years the noble Riesling from Austria's best-situated vineyards produces one of the world's finest wines of this variety. Its attractive bouquet usually has delicate notes of peaches, apricots and citrus fruits. Because of its piquant acidity, the Riesling is very racy and long on the palate; it constantly develops and thus ages very well; this applies in particular to the rare <i>Spätlese</i> and <i>Auslese</i> wines (or the <i>Wachauer Smaragdwein</i>).		
Neuburger 1,094 ha	2.26	Thermenregion, Wachau, Neusiedlersee and Neusiedlersee-Hügelland, Wien
Nutty, full-bodied, mild. According to tradition, the Danube gave Austria this special variety, exclusive to this country. Legend would have it that in 1850 an unknown type of vine was washed ashore. It was planted by the winegrowers and given the name Neuburger. The Neuburger grape produces elegantly reserved white wines, sometimes somewhat neutral in fragrance and of powerful but mild manner; its fine, nutty taste is characteristic.		
Frühroter Veltliner (Malvasier) 626 ha	1.29	Niederösterreich
Very delicate, almost neutral bouquet, remotely reminiscent of marzipan or candyfloss. This early-ripening variety, which by the way is not related to the Grüner Veltliner, is grown in areas north of the Danube and in the Thermenregion, where it produces very early-ripening, round and soft wines with a delicate spicy veil. Because of its rather low acidity, the Frühroter Veltliner is very well suited to producing new wines (<i>vins de primeur</i>), best enjoyed in their youth. Other variations are the more or less dry <i>Spätlese</i> and <i>Auslese</i> wines, in which the relatively high alcohol content provides the appropriate support.		
Muskat-Ottonel 418 ha	0.86	Neusiedlersee and Neusiedlersee-Hügelland
Intensive bouquet, grapey, mild. Depending on the degree of maturity of the grapes, the Muskat bouquet is more or less pronounced; because of its low acidity the Muskat-Ottonel is very mild and supple. Dry types, which should be drunk young, make a good apéritif: the sweet <i>Prädikat wine</i> – which ages well – is suitable with dessert. There are very promising vineyard areas around Lake Neusiedl (Neusiedlersee).		
Traminer 363 ha	0.75	In all wine-growing areas
Intensive aroma, full-bodied, soft. This highly aromatic white wine is easy to recognise by its intensive fragrance of roses and dried fruit. There are three varieties of Traminer in Austria: the clearly predominant Roter Traminer, the especially spicy Gewürztraminer and the almost extinct Gelber Traminer. Despite its low acidity, the Traminer ripens reliably, and thus produces an interesting <i>Prädikat wine</i> .		

Bouvier	365 ha	0.75	Burgenland
Discreetly grapey with delicate Muscat aromas, this extremely early ripening grape variety is used primarily for the production of fresh fruit juice (<i>Most</i>) and young wine in full fermentation (<i>Sturm</i>) in the wine-growing area of Neusiedlersee. Although its importance has declined in recent years, it is still used for making <i>Prädikat</i> wine of high and even outstanding quality, in which its fine spice notes provide polish. It is particularly well suited for making blended dessert wines.			
Sauvignon Blanc (Muskat-Sylvaner)	314 ha	0.65	In all wine-growing areas
Paprika spice, vivacious, piquant. With the current wave of new plantings it is easy to forget that this grape variety was planted in Austria more than a hundred years ago. Its paprika-like spice is replaced over a long period of ageing by aromas of asparagus and black currants. Very fresh and stimulating with a racy acidity structure, the Sauvignon is an elegant, fruity wine of unmistakable character that also ages well in the medium term.			
Goldburger	309 ha	0.64	Burgenland
After an initial wave of planting, this new strain from the oenology school in Klosterneuburg has not met with the expected acceptance. In general its bouquet is grapey to neutral, reminiscent at its best of the citrus spice of the parent Orangetraube. The other partner in this cross was the late-ripening Welschriesling. Because of its early ripening this grape variety is now used primarily for the production of finer <i>Prädikat</i> wine.			
Veltliner Rot	258 ha	0.53	Niederösterreich
When yields are too high, this autochthon grape brings rather thin, acidic wines, but with good clone selection and rigorous yield restrictions, wines of deep concentration and intense aromas with raisin nuances are achieved. Despite high extract concentration, the variety's excellent acidic structure gives good balance to an often relatively high alcohol content. Some of the most interesting wines from this rare grape variety are found in the Wagram district of Donauland.			
Ruländer (Grauburgunder, Pinot Gris)	293 ha	0,60	Niederösterreich and Burgenland
Rather dark yellow-gold, sometimes with a clear coppery light; bouquet reminiscent of caramelised sugar and white bread, at best with peach and apricot fruit as well. Despite its merits this grape variety from the Burgundy family –and perhaps even its oldest “ancestor” –has failed to become fully established in Austria. Particularly with long ageing, Ruländer wines have an impressively rich body and supple, almost oily fullness, sometimes combined with rusty-smoky components. In hot vintage years the acidity of the Ruländer can be somewhat low, allowing the alcohol to gain the upper hand. The high-quality wines age outstandingly well, preserving their concentrated character for a long time. Along the Lake Neusiedl (Neusiedlersee) first-class dessert wines are made from the Pinot Gris grape. Due to its high sensitivity to noble rot it is convincing both as a pure variety and as a component in a sweet white-wine blend.			
Zierfandler (Spätrot) und Rotgipfler	98 and 118 ha	0.45	Thermenregion
Nutty spice, robust, elegant. Even in mediocre vintage years this grape variety quickly attains qualities from <i>Spätlese</i> upwards. Typical are the bouquet of almonds and pistachios as well as the fullness and elegance on the palate. Because of its powerful acidity the Zierfandler also has a relatively long maturation period; this applies all the more to <i>Prädikat</i> wine. With its regional counterpart, the Rotgipfler, it is often blended and is then known as the Spätrot-Rotgipfler.			
Grüner Sylvaner	53 ha	0.11	In all wine-growing areas
Retentive fruity notes with echoes of pears, sometimes with rather leathery or nutty spice notes. This grape variety, which is very popular in the German wine-growing areas of Franconia (Franken) and Rhineland (Rheinhesse) has lost much of its popularity in Austria in recent years. If this trend continues, this variety will continue to fall into oblivion and soon be considered a rarity. It is occasionally grown in most Austrian wine-growing areas from Südsteiermark to northern Weinviertel, where in good vintage years it produces discreet wines with more herbal spice than primary fruit aromas.			
Furmint	n. a.	n.a.	
Greenish-yellow color; intense bouquet; racy, pronounced acidity; can attain high levels of dry extract and alcohol. Demanding of site and aspect, requiring warm, dry soil. Susceptible to powdery mildew, withstands botrytis well. Within Austria found predominantly in Burgenland and is favorably used in Ruster Ausbruch.			
Other high-quality varieties	2,166 ha	4.47	In all wine-growing areas

Variety (Red)	Cultivated Area (in %)	Important Growing Areas in Austria
Zweigelt blau 4,350 ha	8.97	In all wine-growing areas
Cherry fruit, attractive, velvety. This variety was named for the Austrian plant-breeder Prof. Fritz Zweigelt, who created this successful cross of Blaufränkisch and St. Laurent. As new wine the Zweigelt has a pronounced fruity bouquet that becomes rounder and finer with ageing. It ranges in quality from a light table wine to be enjoyed in its youth to powerful wines for ageing. The sturdy Zweigelt vine produces good results in all of the domestic red-wine areas and is thus considered Austria's great red-wine prospect.		
Blaufränkisch 2,641 ha	5.45	Burgenland
Dark berry notes, astringent-spicy, medium tannin levels. The name Blaufränkisch (literally "blue Franconian") probably dates from the time of Charlemagne, when all high-quality varieties were classified as "Franconian" (<i>fränkisch</i>) while those of lesser value were called "Hunnish" (<i>heunisch</i>) and eliminated. In its youth this Austrian speciality is an impetuous, deeply fruity red wine, which with ageing becomes more velvety and supple, gaining additional facets.		
Blauer Portugieser 2,358 ha	4.86	Niederösterreich and Burgenland
Grapey, mild, low in tannins. The Blauer Portugieser is said to have been brought by a wine merchant from Porto to Niederösterreich, more specifically to Bad Vöslau. Because this grape variety develops very quickly, it should generally be drunk in its youth. In good years the Thermenregion in particular produces mild and juicy red wines with soft tannins and the pleasant aroma of violets. But grapey and harmonious Portugieser grapes also grow on the "red-wine islands" of the Weinviertel.		
Blauburger 884 ha	1.82	Niederösterreich
This Austrian red wine variety was developed in 1923 by Dr. Fritz Zweigelt at the Klosterneuburg Vinicultural College and is a crossing of Portugieser and Blaufränkisch. This rather undemanding variety ripens early, is especially suited for cooler microclimates, and is a versatile and dependable blending partner. Its intense, dark color is favored together with paler varieties. The bouquet is rather neutral displaying discreet berry fruit and while flavorful, the variety displays little tannin content.		
Blauer Burgunder (Pinot Noir) 409 ha	0.84	Niederösterreich, Burgenland and Wien
Discreet bouquet, elegant, soft tannins. Despite some new vineyard planting, this grape variety, which made the red wines of Burgundy famous, is still under-represented in Austria. The Pinot Noir has a very fine bouquet that is difficult to describe, best perhaps as reminiscent of raspberries or almonds. Its taste has lots of fruity charm and elegance. Despite its delicate structure it ages better than many wine-lovers assume. In good – and especially in dry – vintage years it will produce remarkably fine wines in Austria as well, for example in the Thermenregion or in Vienna (Wien).		
St. Laurent 415 ha	0.86	Niederösterreich and Burgenland
Fine, unmistakable aromas of amarelle cherries and dark berries distinguish this indigenous Austrian red-wine variety. Because of several unpleasant qualities, such as its susceptibility to blossom drop and <i>Botrytis</i> , this grape variety is rightfully considered to be difficult and has fallen into disfavor in recent years. Particularly in dry years, this grape produces very noble and supple wines in the wine-growing areas of northern Burgenland and in the Thermenregion. To a certain extent it resembles a more powerful variant of the Pinot Noir and thus is undergoing a certain renaissance at the moment. With its delicate tannins, the St. Laurent can give red-wine blends added flair.		
Blauer Wildbacher (Schilcher) 464 ha	0.96	Weststeiermark
Grassy, piquant spice, very pronounced acidity. Perhaps the most independent and certainly the most original rosé wine of Central Europe is planted almost exclusively in the wine-growing area of Weststeiermark. Only on the slate soils at the foot of the Koralpe does it reveal its inimitable bouquet of grassy, herbal spice. Racy acidity is predominant in the taste. The extremely effervescent wines made from Wildbacher grapes should be drunk very young in any case. The Schilcher owes its name to its shimmering (<i>Schillern</i>) in an extremely wide variety of nuances, which extend from a pale grey-rosé to a powerful strawberry red. The Schilcher is particularly fine as an apéritif or accompaniment to a hearty snack.		
Cabernet Sauvignon 312 ha	0.64	Burgenland, Carnuntum and Thermenregion
The complex bouquet of this grape variety can vary from bell pepper, red currants, and nettles (by rather high yields) to dark, ripe berries with sweet components. The abundant tannins of Cabernet are often enhanced by the use of small oak barrels, which can add nuances of chocolate and cacao. This widely spread international variety is an ideal partner for powerful red wine blends. The rather late-ripening fruit makes site selection a priority.		
Merlot 112 ha	0.23	Niederösterreich and Burgenland
This very adaptable grapevine has found another good home in the Austrian climate and soils. The loose bunches of small grapes ripen early making green, grassy tones easy to avoid and fully ripe, juicy berry aromas and supple tannins attainable. Merlot is an excellent blending partner in red wines.		

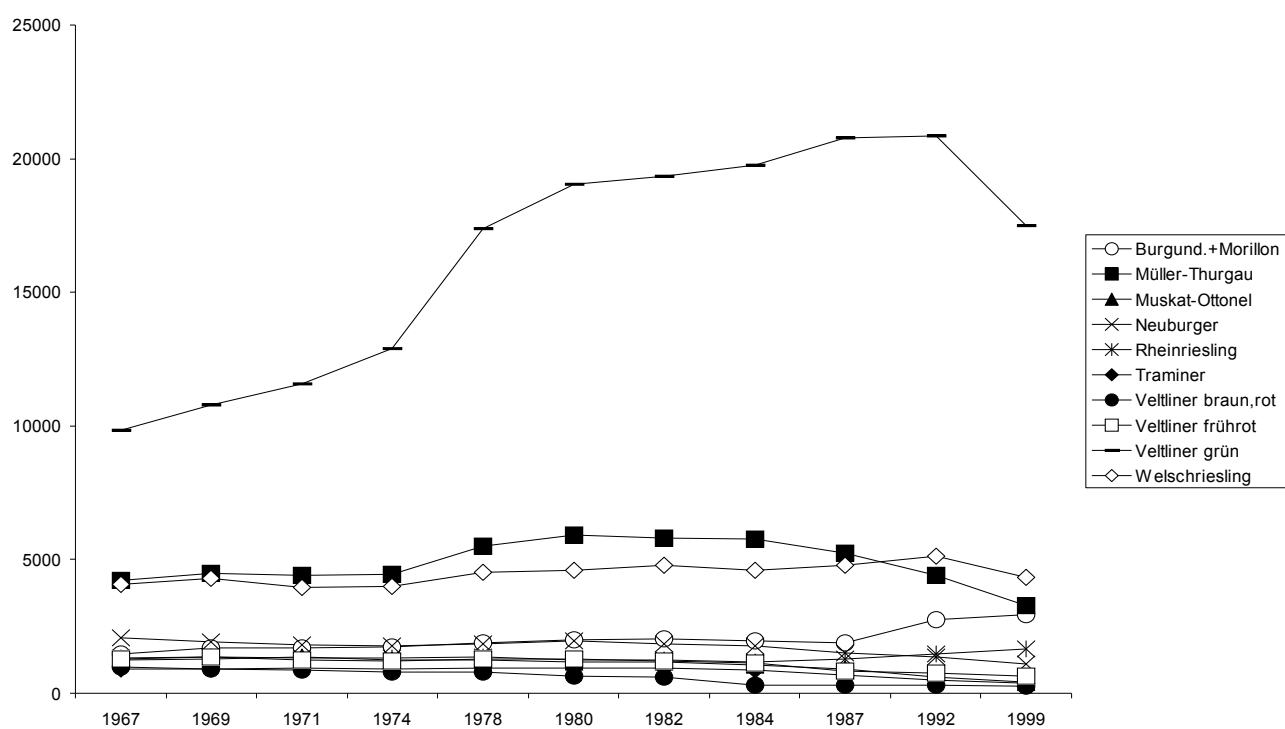
Syrah	n.a.	n.a.	
This old variety of French origin has been making a victory march through the wine world, especially the New World, in recent years. Syrah is frequently of deep, even opaque colour and the riper the fruit, the more discreet the nose. Kitchen herbs and eucalyptus with smoky tobacco and spicy notes make up the classic bouquet and are sometimes accompanied by cedar and pepper nuances. Austrian Syrah differs from its New World counterpart through a more discreet aroma and more elegant fruit, usually showing deep berry flavours and pleasant yet distinctive tannic structure.			
Rössler	n.a.	n.a.	
This new crossing from the Vinicultural College Klosterneuburg is undemanding of soil type and location aspect as well as being robust and resistant to frost and disease. These virtues make it possible to view Rössler as environmentally friendly. Large bunches with small grapes ripen relatively early and bring velvety red wines with abundant extract and tanni, good concentration, power, and character. Good colour extraction with violet tones is typical for this variety as are intensive wild berry aromas.			
other Grape varieties	1.715 ha	3,53	In all wine-growing areas

n.a. Data not available

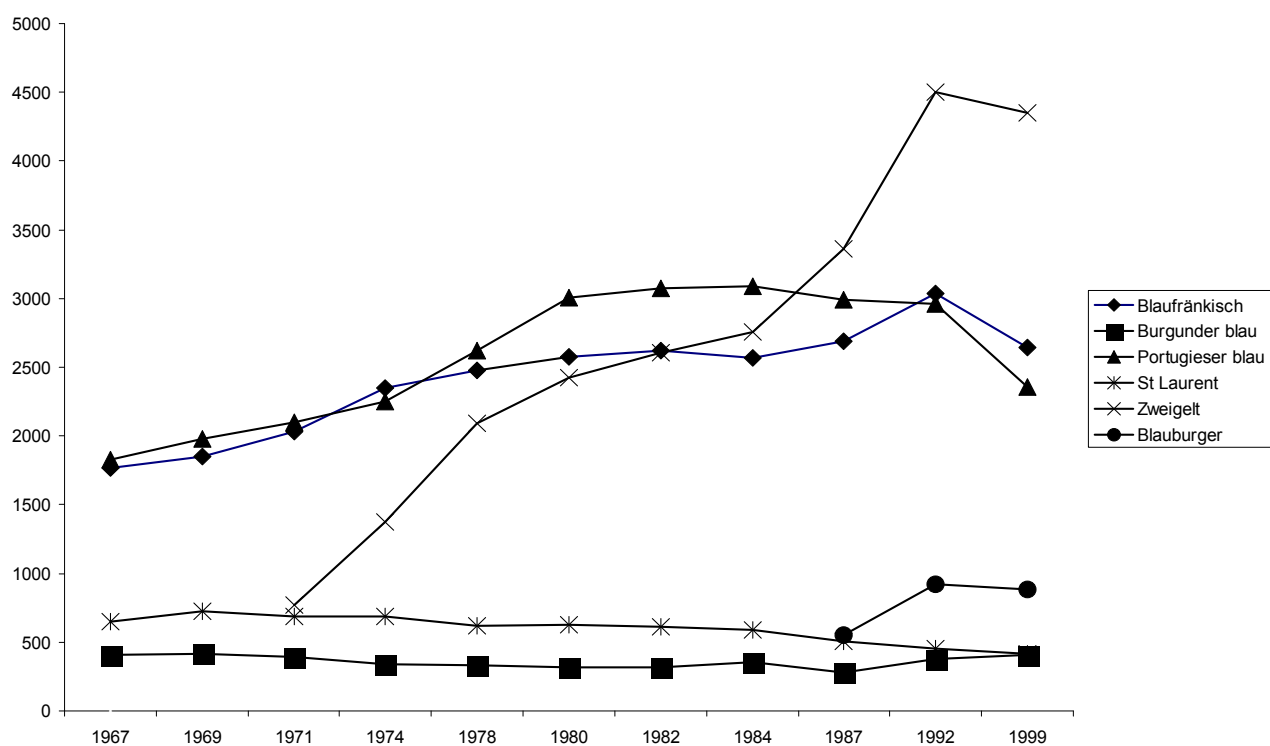
Source: Statistics Austria

1.2.3 Development of the Area under Cultivation until 1999

White Wine Varieties in Austria



Red wine Varieties in Austria



Source: Statistics Austria

Charts: HBLA and BA Klosterneuburg

1.3 The Grape Varieties and their Origin

From the article “Information Worth Knowing about Our Grape Varieties” (“Wissenswertes über unsere Rebsorten”) by **Dr. Ferdinand Regner**, Federal College of Viticulture and Pomology, Klosterneuburg, Vine Breeding Department. From: *The Wine Grower (Der Winzer)* 11/99

The classical grape varieties that we have been cultivating in our vineyards for centuries all carry the secrets of their origins in their DNA. The history of their development becomes comprehensible only by analysing the DNA of each variety and then comparing their genetic profiles. In this manner relationships can be discovered, origins reconstructed and the leading varieties recognised. A comprehensive analysis of the grape varieties is like a journey to bygone times but remains relevant to the viticulture of today. The basis for this analysis of our grape varieties is provided by the methods of molecular biology. For those interested in viticulture, better knowledge of the origins of our grape varieties represents a considerable expansion of our understanding.

The catalogue of Austrian grapes has been treated in extensive studies, so that much is already known about the familiar varieties. The origins of several of them can now be explained using information about the parent varieties, or at least one of them. Distinctions based on grape colour are quite irrelevant in a genetic context, as illustrated by the Burgundy grape, and will be disregarded here. Analyses of a wide variety of Burgundy clones have demonstrated that the differences between individual clones, e.g. of the Pinot Noir grape, are greater than between the colour types.

Bianca:

New Hungarian strain: because of the genetic profile, its origin as Bouvier x SV 12375 is beyond a doubt.

Blauburger:

This variety resulted from a Blauer Portugieser x Blaufränkisch cross, in accordance with information provided by its breeder, Prof. Fritz Zweigelt.

Blauer Burgunder (Pinot Noir):

The Burgunder variety derives from a Schwarzriesling x Traminer cross. Even previously, the Schwarzriesling was considered a Burgunder mutant, but the differences in appearance and in the genetic makeup preclude a clone mutation. The three various grape colours are thus genetically based.

Blaufränkisch:

The derivation of this variety from a Heunisch cross appears to be clear, but the second parent is unclear. Because of the great similarity, however, the Blauer Grober, Blauer Zierfandler as well as an unknown variety could be the second parent.

Bouvier:

Derives from a seedling crossed by Mr. Bouvier in Bad Radkersburg. One parent was a Burgunder; the second has not yet been determined.

Grauer Burgunder, Weisser Burgunder (Pinot Blanc):

The varieties are genetically identical with the Blauer Burgunder. The various grape colours can be explained as a cross between varieties, resulting in the blue grape colour (Schwarzriesling) or grey or white grape colour (Traminer).

Chardonnay:

Although the German synonym Feinburgunder is inappropriate, the Chardonnay variety derives from a Burgunder x Heunisch cross. Morillon is a variety of its own and is also a Burgunder cross, although the second parent has not been determined. Most Morillon clones, however, are genuine Chardonnays and are only called Morillon in error. But since the name Morillon is older than the name Chardonnay it may be assumed that the distinction was made very late. Thus the differentiation of Burgunder based on individual clones creates problems even today.

Cabernet Franc:

This variety still bears traces of the wild grape and probably derives from it, although there are recognisable signs of a cross with *Vitis vinifera*.

Cabernet Sauvignon:

As indicated by the name, this variety derives from a Cabernet Franc x Sauvignon cross.

Frühroter Veltliner:

The origin of this variety is a Roter Veltliner x Silvaner cross. The synonym Malvasier is a problematic name because there are numerous other Malvasier varieties that have nothing to do genetically with this variety. In addition, the name Malvasia is applied in Italy very generally to many grape varieties, often coupled with a regional name e.g. del Lazio. Finally the Malvasia Rose du Po was recognised as being identical with the Frühroter Veltliner. But since both the Silvaner and the Roter Veltliner are very typically Austrian, domestic origins can be assumed for the Frühroter Veltliner.

Furmint:

The Furmint has been recognised as a Heunisch cross; the second parent must have borne a similarity to other Hungarian varieties.

Goldburger:

Tests confirm the information from the breeder that this variety derived from an Orangetraube x Welschriesling cross.

Jubiläumsrebe:

The origins of this variety do not correspond with the original information that it was a Blauer Portugieser x Blaufränkisch cross. Rather it derives from "Cross 48" conducted by Prof. Fritz Zweigelt between a Grauer Portugieser and Frühroter Veltliner.

Kadarka blanc:

This is identical with the variety Martinsriesling but is not directly related to the Blauer Kadarka.

Merlot:

Like Cabernet Sauvignon, this variety also derives from a Cabernet Franc cross; the second parent has not yet been determined.

Müller-Thurgau:

Bred by Prof. Hermann Müller from Thurgau, it derives from a Riesling x Madeleine Royale cross.

Comprehensive analysis has revealed that there is a high degree of correspondence between the varieties Madeleine Royale and Chasselas de Courtillet, but it has not been possible to prove them identical, as was earlier believed to be the case.

Muskat-Ottonel:

This seedling grown in France corresponds to a Gutedel x Muscat cross, although the Muskat variety could not be clearly defined.

Gelber Muskateller:

The family of Muscat varieties is extremely large and has been researched too little thus far to be clearly defined. The fact is that the Muscat varieties are all genetically related to one another, although not all of the immediate crosses can be defined by their derivation. Certain allelomorphs (genetic forms) may be found in most Muscat varieties.

Neuburger:

According to legend, this variety was fished from the Danube; it corresponds to a Roter Veltliner x Silvaner cross.

Riesling:

This descendant of a Heunisch cross with a so-called Franconian variety (Traminer seedling) may be assumed to be the origin of the Riesling variety.

Rotgipfler:

Derives from a Traminer x Roter Veltliner cross.

Sauvignon Blanc:

Also derives from a Traminer cross but must have mutated from a preliminary stage e.g. Sauvignon Rose.

Scheurebe:

The variety does not derive, as previously asserted, from a Riesling x Silvaner cross. The Riesling has been confirmed as one parent variety, but Silvaner is not a parent, nor has any other tested variety been deemed appropriate. Prof. Scheu has worked very intensively with wild grape varieties, and it is believed that one of them is the second parent. Unfortunately most of this collection of wild grape varieties has been lost in the course of time, and a final clarification now seems unlikely.

St. Laurent:

The name “Pinot St. Laurent” as a synonym for this variety is completely correct, since the St. Laurent is a Burgunder seedling.

Silvaner:

The Silvaner has been recognised as a domestic grape variety, a derivation of Traminer x Österreichisch Weiss. Its broader genetic background is the same as numerous classical varieties of Heunisch x Fränkisch. Österreichisch Weiss is a Heunisch seedling.

Traminer:

The Traminer may be considered to be a cross that developed from wild grape varieties. The most closely related grape is *Vitis silvestris* Gmelin.

Grüner Veltliner:

As mentioned earlier, the Grüner Veltliner is a Traminer descendant with genetic traces of the Veltliner.

Roter Veltliner:

This variety also corresponds to the types Veltliner Weiss, Silberweiss, Braun and Gelbling

Blauer Wildbacher:

Also derived from a cross; the Heunisch has been identified as a parent.

Zierfandler:

This variety is also derived from the Roter Veltliner. The second parent remains unknown so far but strongly resembles the Traminer.

Zweigelt:

The derivation of the variety Zweigelt corresponds to the breeding record of a Blaufränkisch x St. Laurent cross.

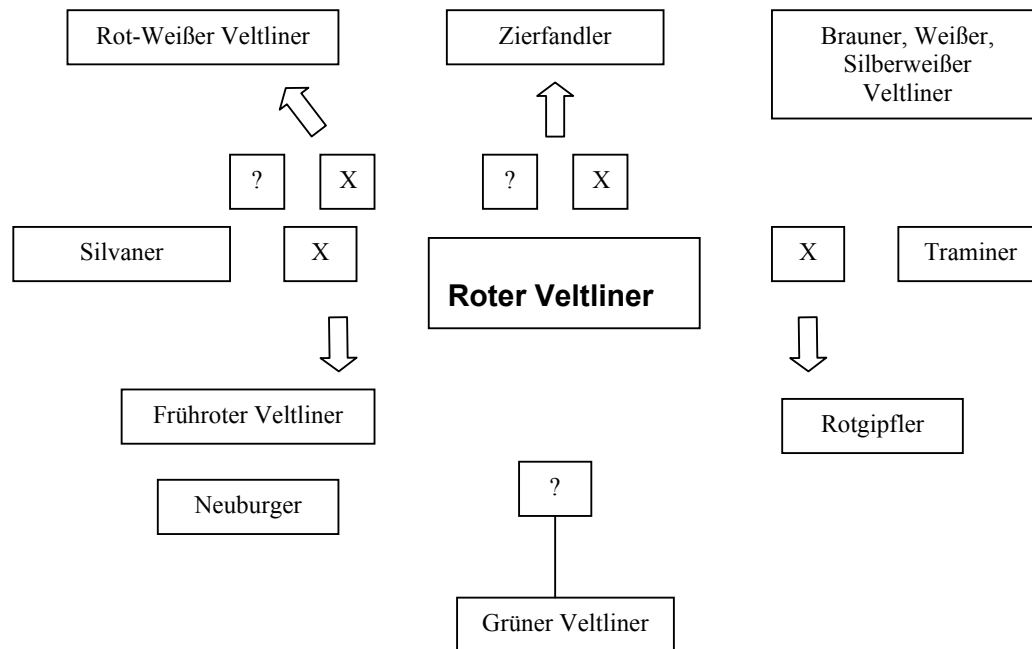


Illustration 1: The **Veltliner family**: the genetic relationships within the family of the Veltliner variety attribute a central role to the Roter Veltliner. A link to the Grüner Veltliner has not yet been discovered.

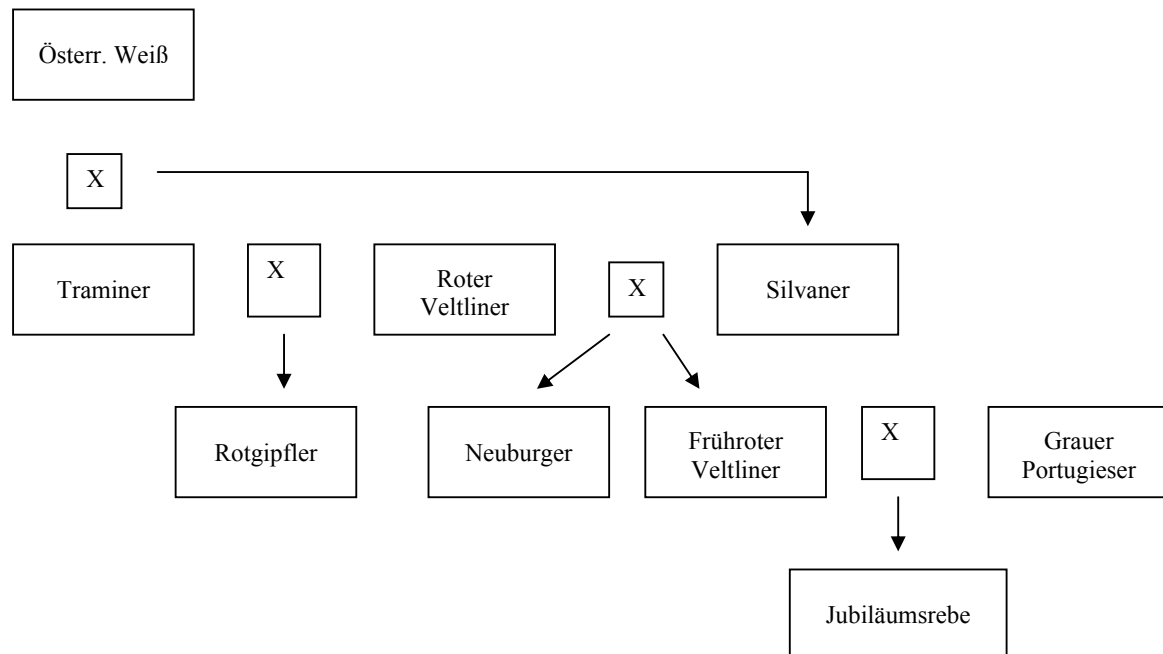
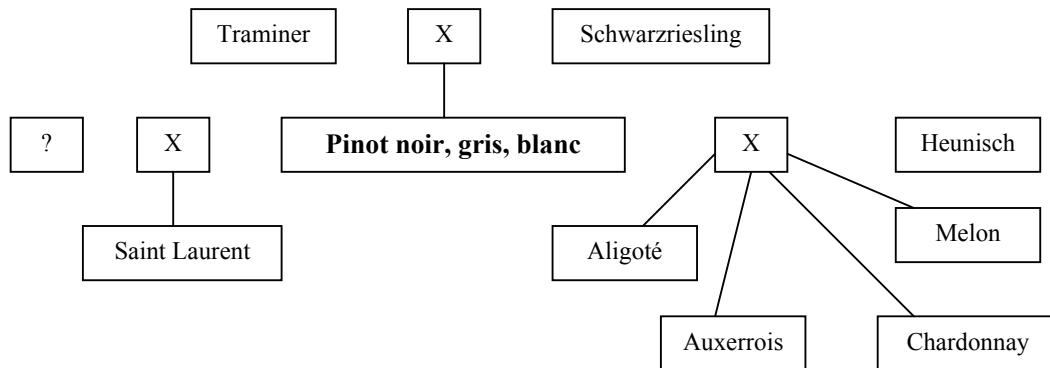


Illustration 2: Analysis of the varieties Silvaner and Frühroter Veltliner have identified the Traminer variety as an important ancestor.

Pinot pedigreeIllustration 3: The **Burgundy Family**:

With genetic analysis using simple sequence repeat (SSR) markers, several grape varieties of the burgundy family have been described and the relationships among them explained. It has not been possible up to now to distinguish between Blauburgunder (Pinot Noir), Grauburgunder (Pinot Gris) and Weissburgunder (Pinot Blanc); it can thus be assumed that the three colour variations come from the same genotype. The varieties Frühburgunder and Blauer Arbst also show the same SSR profile and are thus also of the burgundy type. The varieties Schwarzriesling (= Müllerrebe) and Farbklevner show a mutually identical profile and are clearly different from the burgundies. Samtrot has been recognised as a mutant of the Schwarzriesling grape. The profile of Schwarzriesling is very similar to that of the Pinot group, and it may be assumed that Traminer and Schwarzriesling are the parent varieties of that group. Numerous other Pinot relatives have been identified as descendants: St. Laurent is a Pinot offspring crossed with an unknown partner; Aligoté, Auxerrois, Melon and Chardonnay are white descendants of the Pinot grape. Based on its profile, a possible partner might be Heunisch, a very ancient variety.

1.4 Wine-growers in Austria - A current overall view

Basic survey of the area under vines (1999) (areas in hectares)

The following survey criteria were established by Statistics Austria for its agricultural-structure survey of wine:

- area under agricultural cultivation of at least 1 ha
- vineyard area of at least 2,500 m²

	Wineries with a vineyard area of ...									
	< 0,10 ha		0,10 to < 0,25 ha		0,25 to < 1 ha		1 to < 2 ha		2 to < 3 ha	
	number	area	number	area	number	area	number	area	number	area
Wine-growing area										
Neusiedlersee	1	0	38	7	858	460	528	754	290	715
Neusiedlersee-Hügelland	18	1	93	17	1 276	647	438	620	179	445
Mittelburgenland	6	0	22	4	446	248	192	277	94	226
Südburgenland	209	12	211	33	318	153	52	71	13	31
Thermenregion	7	0	44	7	309	165	188	270	119	292
Kremstal	3	0	23	4	476	245	148	213	74	184
Kamptal	2	0	10	2	477	257	178	254	114	281
Donauland	19	1	93	15	645	336	206	286	94	230
Traisental	7	0	83	14	290	156	101	144	25	62
Carnuntum	6	0	32	6	275	142	129	182	51	120
Wachau	7	1	43	7	278	148	117	165	77	191
Weinviertel	73	5	445	75	3 491	1 915	1 280	1 814	696	1 704
Südsteiermark	29	2	67	11	367	198	184	260	108	268
Weststeiermark	17	1	43	7	220	119	106	144	25	62
Süd-Oststeiermark	326	19	549	87	798	404	192	265	86	208
Wien (Vienna)	-	-	3	1	90	46	43	65	22	53
without classified wine-growing area	15	0	24	4	52	26	14	19	4	9
Federal States										
Burgenland	234	14	364	61	2 898	1 508	1 210	1 721	576	1 417
Niederösterreich (Lower Austria)	129	9	785	134	6 279	3 384	2 354	3 338	1 252	3 070
Steiermark (Styria)	375	22	662	105	1 387	721	482	669	219	539
Wien (Vienna)	-	-	3	1	90	46	43	65	22	53
others	7	0	9	2	12	6	7	9	2	4

	Wineries with a vineyard area of ...							
	3 to < 4 ha		4 to < 5 ha		5 ha and more		total	
	number	area	number	area	number	area	number	area
Wine-growing area								
Neusiedlersee	230	793	181	812	570	4 856	2 696	8 398
Neusiedlersee-Hügelland	143	490	103	457	245	2 124	2 495	4 800
Mittelburgenland	40	136	27	122	85	814	912	1 826
Südburgenland	3	10	2	9	7	43	815	362
Thermenregion	96	328	69	305	148	1 232	980	2 601
Kremstal	49	171	36	160	155	1 371	964	2 349
Kamptal	77	270	63	284	260	2 723	1 181	4 070
Donauland	64	220	57	254	149	1 343	1 327	2 686
Traisental	21	71	12	54	30	213	569	715
Carnuntum	23	80	22	97	37	254	575	881
Wachau	48	164	38	169	73	527	681	1 373
Weinviertel	461	1 604	334	1 495	941	8 094	7 721	16 707
Südsteiermark	68	235	58	260	77	699	958	1 932
Weststeiermark	13	44	6	27	10	128	440	532
Süd-Oststeiermark	29	99	17	74	15	126	2 012	1 283
Wien	16	54	8	36	35	367	217	621
without classified Wine growing area	4	14	1	5	-	-	114	77
Federal States								
Burgenland	416	1 429	313	1 399	907	7 837	6 918	15 386
Niederösterreich (Lower Austria)	841	2 914	631	2 818	1 793	15 759	14 064	31 425
Steiermark (Styria)	110	378	81	362	102	953	3 418	3 749
Wien (Vienna)	16	54	8	36	35	367	217	621
others	2	7	1	5	-	-	40	32

Again, the survey criteria were established by Statistics Austria for its agricultural-structure survey of wine:

- area under agricultural cultivation of at least 1 ha
- vineyard area of at least 2,500 m²

Source: Statistics Austria

1.5 The 2004 Vintage Year

The very changeable year 2004 got off to a positive start – with plenty of precipitation. Especially in the eastern wine growing areas there was a lot of snow, and after the heat wave of 2003 the vines could recuperate under a white duvet. Unfortunately, the weather continued just as wet and cool, and budding was delayed considerably in some cases. The sun refused to come out even in May and June, blossoming occurred late, and was partially marred by persistent rain. A natural limitation of yields at this early stage was the result.

When a persistently cool and rainy July delayed ripening further, pessimism began to spread among the producers. The change came with a radiant August and a similarly beautiful September, which even created some sun damage on younger vines. With the beginning of September cool nights began to accelerate the creation of deep aromas in the grapes. The rain returned just as the harvest of early varieties had begun, and it continued for most of October. In the Danube valley and its subsidiary river valleys, but also in the Weinviertel and the Northern Burgenland, persistent fogs and high pressure episodes created additional complications, as the resulting high humidity gave the grapes hardly a chance to dry off between rain falls. This created ideal conditions for noble rot, and the harvest of the ripe premium white wines and late red varieties such as Blaufränkisch and Cabernet around Halloween was often a race against time, and against spreading Botrytis.

One man's loss is another man's gain: the sweet wine producers could hardly suppress contented smiles. Late and quickly, they harvested great amounts of concentrated nobly-sweet grape material. The low temperatures necessary for ice wine, however, failed to materialize by mid December. Only Eisenstadt was an exception here.

In view of the changeable weather conditions, the most important white varieties will show a considerable bandwidth of qualities. Strong fungal attacks required painstaking protection and very careful green harvest. Targeted and sustained work in the vineyard, however, also made possible very high sugar gradations by early October, even if sugar levels did not continue to rise afterwards, and the grapes did not concentrate through evaporation because of the high humidity.

Because of their almost ideal acidity, the first young wines taste fresh and racy, though never too aggressive. In concert with good extract values, these will become well-balanced and animating wines, perfect vehicles for varietal typicity. Especially Grüner Veltliner and Sauvignon Blanc will profit from this, but also Muskateller and Chardonnay. Some of the late-harvested Riesling are not yet ready.

The quality of those premium white wines traditionally harvested in November is still an open question. Apart from the pressure of botrytis, there are great losses in quantity, but sophisticated vintners might achieve superbly interesting and complex wines. In Styria, some producers have already announced that they will not bottle single-vineyard wines, others will only create very small batches of these. Otherwise, we can hope for many fresh and lean wines, in the well-known "classic" Styrian style. The late and sudden noble rot has created a multitude of sweet wines in the bastions of nobly-sweet wines in the northern Burgenland; here, qualities and quantities are reminiscent of 2002 or even 1998, though it is still too early to pronounce on the style of these wines.

It is a fairly reliable rule of thumb to assume that in Austria, hot and dry years favour red wines, while cool and humid years are better for whites. Fortunately, there are also years that offer ideal conditions for white and red: such years were 1999, 1997, and 1993. After the controversial vintage 2004 we are observing a different phenomenon: cool and changeable weather resulting in top qualities for some red wine types. This is true particularly for Zweigelt, St Laurent and Pinot Noir, which were harvested before the great rains around Lake Neusiedl, but also in the Lower Austrian red wine islands of Thermenregion and Carnuntum. These are very attractive wines with beautiful colours, power, and great length. High sugar levels resulted in alcohol similar to 2003, but the aromas will probably prove to be much deeper and more complex in 2004.

In Middle and Southern Burgenland, too, the main varietal Zweigelt has created some very powerful and substantial red wines, while the late-ripening Blaufränkisch is lighter than in previous years, though not without spice and character. French varieties such as Cabernet and Merlot presented more problems, and suffered from short maturation periods. Only few of them will have sufficient substance for barrique vinification.

1.6 The 2003 Vintage Year

There was little time for gentle spring sentiments at the beginning of last year's warm season. Already a week after Easter an early heat wave swept over the country, and except for a cool week each during May and August, four searingly hot months followed. Hail storms in mid-May, which devastated parts of the Vienna vineyards and reduced yields there drastically, were the only negative aspects of an otherwise highly promising early growing season, with good and easy blossoming in dry and warm conditions.

The hot and almost rain-free summer caused the plants to build up a considerable advance on the normal vegetative cycle, despite the fact that some younger vines suffered from the dryness. In view of the predominantly Mediterranean climatic conditions (the Styrian capital of Graz recorded top temperatures of 40 degrees Celsius) the growers had to demonstrate great flexibility: during "normal" years the grapes have to be liberated from overhanging leaves in order to assure ripening, this year necessitated the reverse, and many producers decided to provide the grapes with foliage "parasols" in order to prevent sunburn and other signs of stress. The competition between vines and other plants in the vineyard also had to be limited to a minimum in 2003.

Earlier than ever before, and in conditions that reminded more of Sicily than of Austria, the vineyards on the eastern banks of Lake Neusiedl were harvested already from 20 August onwards, for Sauvignon, and 25 August for Pinot Noir. In the hotter parts of the country Zweigelt and St Laurent had to be harvested soon afterwards; the year 2000, with its shrunken, raisin-like berries was an experience none of the growers was keen to repeat. During the last week of August, the weather suddenly changed, and temperatures dropped as low as ten degrees. The Indian summer that followed during September was warm once more, but nights remained noticeably cooler and fresher, causing a slowing down physiological ripening, ideal for the development of more complex aromas in the grapes. There were no further significant incidences of rain until mid-October, assuring the perfect health of the grape material.

Even during a hot year such as 2003, which favours high alcohol and low acidity, the white wine country Austria shows a wide variety of white wine types. This may not be an ideal vintage for lighter, fruit-driven and fresh whites, but suitably early harvests made it possible nevertheless to preserve the racy acidity making some of these wines justly famous. The dryness, however, raises questions. In 2000, similar conditions led to elevated tannin contents and occasionally correspondingly bitter aromas. *A propos* 2000: will this year's whites be comparable with those of 1992, the last great hot vintage? It may still be too early to give a definite answer, but the cool September nights may just have saved the day by making sure that acidity did not sink too far. The strong increase in fruit aromas during the last three, four weeks, which gave the grapes such depth and harmony, was as fascinating as it was surprising.

Varietal character also seems to be quite clearly pronounced, and Riesling, Grüner Veltliner and Chardonnay are quite easy to distinguish even as grapes. The aromatic varieties such as Muskateller show wonderful qualities this year, while the jury is still out on Sauvignon Blanc, which may have suffered from stress. Traminer, too, could be marked by often very low acidity. Ideal PH values will favour especially white wines fermented in barriques, such as Burgundian varieties or the ever-capricious Rotgipfler.

The 2003 vintage will feature only low quantities of dessert wines, as occurrences of botrytis were extremely limited, and even mid-December frosts did not suffice for the production of ice wines.

Expected red wine qualities are very much easier to outline. Those who did not succeed in making a wonderful red wine this year have only themselves to blame. Even the Burgundian varieties show themselves enormously deep in colour, and dark, profound aromas are matched by an unusual richness, creating red wines which will be as subtle as they are powerful. First tastings show wines with appreciably more firmness and bite than 2000. Skeptical voices complaining about too much sun seem to miss the point that varieties like Blaufränkisch, Cabernet, Merlot and Syrah cannot have too much sun, especially in our parts. Zweigelt and St Laurent show deep, velvety fruit, while Pinot Noirs will still have to prove that their fine structure did not suffer from the summer heat. There will be red wines full of body and generosity, and especially Blaufränkisch and Cabernet Sauvignon, which present a sensational fruit this year, carry the hopes of many of the country's top producers.

1.7 Brief Characterisation of the Vintages 2002 to 1960

2002

A mild, dry winter was followed by an amiable and equally dry spring. Flowering at the end of May was unproblematic and resulted in good fruit set. Continued warm weather throughout the summer, interspersed with thundershowers brought a lead in fruit maturity that appeared to rival that of the hot 2000 vintage. Certain parts of the wine areas Wachau, Kamptal, and Kremstal suffered disastrous damage from the tremendous precipitation volume during the second and third week of August and the threat of rot required urgent attention from vintners in vineyards all over Austria. Some wet, variable weather continued in autumn but precipitation was distributed among the wine areas unevenly with Central and South Burgenland profiting from dryer, warmer harvest weather. Considering all the pranks of the weather, the wine quality shows quite encouraging results which can be attributed only to the

pedantic work in the vineyards. All in all, for white wines this vintage has a character in between 1999 and 2001 with good prospects for medium-term ageing. In the regions Weinviertel and Thermenregion the results were particularly good, and here the assessment “excellent” seems fully justified. An early appearance of botrytis also led to a considerable quantity of sweet wines, whose character and quality appear promising for long-term aging. The reds all show good colour and fruit, carried by soft tannins. Particularly successful are the Blaufränkisch of Central and Southern Burgenland as well as the earlier ripening varieties St. Laurent and Pinot Noir. A total vineyard area of 46,000 ha brought a total of 2.6 Mio. hl wine in the 2002 vintage. This result is 10% above the yearly average.

2001

A total vineyard area of 46,200 hectare (-1%) brought a total of 2,530,600 hl (+8%) wine for the 2001 vintage. This result is 5% above the yearly average of 2,418,000 hl. 1.759,200 hl meant a 6% increase for white wines and 771,400 hl and increase of 14% for reds.

A dry winter which was so mild that it hardly deserved to be called winter at all was followed in most wine-growing areas by a spring that was dry and pleasant, allowing the vines to develop normally. The hot and summery weather in May even brought to mind the heat records of 2000. After a good blossoming period right up to mid-June, a cool and rainy July finally brought the much-needed precipitation and a chance for the plants to recuperate. August was so hot and sunny that an early harvest date seemed probable. The weather changed promptly as the school year started bringing a September with seemingly endless rains. The last weekend of September finally brought a change for the better and a spell of pleasant weather remained nearly uninterrupted throughout October.

The 2001 vintage whites are fruit-driven and spicy, with good varietal character and a textbook expression of the fine acidity, which is so appreciated by Austrian wine lovers. Lower Austria's predominant grape variety, Grüner Veltliner, had exceptional success in all style categories. White wines from the burgundy family and also Sauvignon Blanc showed good acidic structure and typical varietal character. Like the whites with their clarity and intense fruit, the 2001 reds show great depth of fruit and elegance. While the previous vintage brought more powerful wines, the reds from 2001 will be able to make up for their lacking punch with great charm. The quality of the 2001 red wines exceeds that of the 1995, 1996, and 1998 vintages and has brought both wines evolving early as well as growths of substance. The varieties Zweigelt, St. Laurent and Blauburgunder (Pinot Noir) were particularly successful, but also the Blaufränkisch from Mittelburgenland and Südburgenland brought quite good results. September was ideal for botrytis and guaranteed a slow and continuous spread of noble rot and excellent dessert wines were produced in Burgenland rivalling even the great sweet vintages 1998 and 1999. The Seewinkel district on the east bank of Lake Neusiedl managed to harvest significant quantities as well as remarkable quality.

2000

With 2.34 million hl, the 2000 harvest lay 3% below the yearly average of 2.4 million hl and 17% below the previous year. This decrease was due to the weather, which was sunny with high temperatures and very dry. The winter was wet, but not too cold. A warm dry spring brought ideal vegetation conditions. April and May brought summer-like temperatures encouraging an early flowering. Cool, damp weather brought vines the needed precipitation for development. Because of the extremely hot August, the gape berries were small and the amount of juice low. The harvest was up to three weeks earlier than usual in many regions, making it the earliest harvest since 1794.

The white wine vintage 2000 didn't have the fruit charm and extract of the 1999 vintage, but it definitely did not have the character of an exceedingly hot year either. Since neither the spring nor summer was extreme, the developed grape berries were able to ripen under relatively good conditions. The red wines are deep-coloured, compact, and exceptionally fruity; one may speak of a centennial vintage. Because of the resistant appearance of botrytis, noble sweet wines were produced in small quantities only.

1999

The 1999 wine harvest of almost 28 million hl was 4% higher than that of the previous year. The reason for this increase was the absence of serious frost damage in the main growing areas as well as an adequate supply of water during the vegetative period. Flowering lasted from the middle to the end of June. It resulted in excellent setting without serious coulur. The warm, rainy summer promoted good development of the leaves. However, there was hail damage in both Lower Austria and Styria over an area of about 1000 ha. A variable August was followed by an unusually mild, sunny September, which promoted ripening and created the conditions for an excellent vintage. Optimal weather conditions in October with mild, sunny days and cool nights promoted the formation of aroma in the grapes. The long vegetative period produced grapes rich in extracts, and powerful, well-structured white and red wines were the result. Clear fruit typical of the variety and character typical of the region were other logical consequences of an entirely successful vintage year. This also applies to Austria's famous sweet-wine regions, such as Seewinkel and Rust. The noble rot caused by *Botrytis cinerea* created optimally concentrated grapes at the right time.

1998

In 1998 Austria harvested c. 2,700,000 hl of grapes. Compared with the previous year this was an increase of more than 900,000 hl (+50%). This can be attributed to the smaller losses due to frost damage in comparison to the previous year and the favourable climatic conditions during the summer months. Flowering lasted from early to mid-June and was completed about 14 days earlier than in an average year. The grapes set very well without significant losses due to blossom drop. The rainy but warm July encouraged good foliage development. It was followed by a hot, sunny August, which favoured ripening, and expectations were extremely high. Following several rainy days at the beginning of September the early varieties were harvested right on time during a spell of fine weather. After that the weather was variable and, despite a fairly long sunny spell in all the wine-growing areas and good harvest conditions, growers found it difficult to find healthy grapes ready for harvesting. Both the white and red grapes profited from gains in maturity made during the hot weather of August. In November extremely sweet grapes for *Prädikatswein* were still being harvested, making 1998 a great year for such sweet wines, reminiscent of the '89, '91 and '95 vintages.

1997

In 1997 Austria harvested 1,801,747 hl of grapes. The winter was marked by extreme temperatures as low as -30 C. Following late budding and average flowering, the first vegetative phase – and July in particular – was marked by heavy precipitation (120-240 mm of rain). Any delay in vegetative development, however, was quickly corrected by magnificent weather in August (260-300 hours of sunshine). The health of the foliage and grapes was above average. In September the unusual period of fine weather continued, permitting the main harvest to start in Burgenland by the end of the month. Beginning in mid-October, concentrated *Spätlese* wines were harvested. Apart from sweet wines (e.g. *Eiswein*) the harvest was over by the end of November. Throughout Austria, quality was very high. The 1997 vintage is not only considerably better than the previous year, it is considered one of the

finest years for dry white wine. The share of completely ripe grapes was above average. The wines are particularly pure and typical of the variety. Naturally, acidity levels are lower than in the previous year, for example, but in most cases they are considered satisfactory to adequate. There were ideal conditions for great red wines. But the highest levels of *Prädikatswein*, especially *Beerenauslese* and *Trockenbeerenauslese*, were lacking because the autumn was very dry and there was no *Botrytis* infection to speak of. Only a very short time span was available for harvesting *Eiswein*.

1996

At 2,110,000 hl the grape harvest was considerably lower than the long-standing average (2,609,000 hl). White wines accounted for 73% of the total, while red and rosé wines accounted for 27%. The average harvest per hectare was 4,348 litres. Wien (Vienna) was highest with 5,226 l/ha, followed by Niederösterreich (Lower Austria) at 4,784 l/ha and Steiermark (Styria) at 3,870 l/ha. Burgenland was the lowest at 3,559 l/ha. Wine inventory dropped again.

Shoots and buds appeared several weeks later than normal, but this vegetative deficit was soon corrected. Flowering began very early and in many areas was optimal; it was generally complete within only a few days. The weather in the summer months remained within the long-term average; there was grape must by mid-August. At the end of August and in September it was rainy and unseasonably cool. The vegetative advantage lessened; in the case of sensitive varieties, corrective foliage treatment and early harvest were essential. The quality was largely dependent upon the winegrowers' skills, dedication and willingness to take risks. Where these were present, a magnificent vintage was the result. The spectrum ranges from *Tafelwein* to *Trockenbeerenauslese*, with an emphasis on *Qualitätswein*. Red wines did not attain the greatness and power of the preceding vintages.

1995

Following a mild winter and late budding, the vegetation quickly got back on schedule. The setting of flower clusters was only slightly poorer than in the previous year, but in all wine-growing areas flowering was considerably less favourable. In July there was a prolonged hot period with well-spaced precipitation, but August saw unfavourable weather conditions and there were problems with the powdery mildew. The cold and wet weather period in the first half of September led to widespread grape rot. The harvest size was about 30% smaller than in the previous year. Nevertheless, the sugar content developed well and there were also good values for acidity. At the beginning of October, when there was a sufficient primary infection with *Botrytis cinerea*, followed by a period of dry, warm weather. The fine, long "Indian summer" again produced *Beerenauslese*, *Trockenbeerenauslese* and *Ausbruch* wines. There were great differences between the regions. A report by the Austrian Central Statistical Office (Statistik Austria) judged the musts to be of average quality. The generally excellent levels of acidity gave the wines firmness, and all the areas produced wines of rather good quality. In Lower Austria (Niederösterreich) the Grüner Veltliner was fruity with refreshing effervescence. The grapes grown in Burgenland were often of high sugar content and suitable for making *Prädikatswein*. In Styria (Steiermark) the magnificent, almost cloudless October compensated to a large extent for earlier problems. Volume was extremely low (about 30 to 40% less than in the previous year), but quality was high with fine, fragrant bouquets, lots of fruit and good acidity. At 2,228,000 hl the 1995 harvest was 15.8% lower than that of the previous year. Of the total, 81% was white wine (1,809,000 hl) and 19% red wine or rosé (419,000 hl). This led to a further decline in the total storage inventory of 3,953,000 hl. All in all, the 1995 vintage can be considered an outstanding vintage year for *Prädikatswein*.

1994

The vines wintered well and budding began at the normal time. Following favourable early summer rains, flowering occurred under advantageous conditions, resulting in outstanding pollination. The hot summer would have resulted in a very early harvest had drought not come into play. In the early days of autumn there was a bit of precipitation, allowing the vines to make up for lost time. Sugar levels quickly rose, but acidity dropped, often to quite low levels. The vintage made great demands on the wine-makers; there were many *Kabinett* wines. The quality of the vintage was high. These are wines with lots of fruit, elegance and a fine finish. In particular, white wines with a dominant primary bouquet can be outstanding. The depth of colour of the red wines is good; they are fragrant and velvety.

1993

The vintage year 1993, and thus its wines, were marked by the extreme weather, which for the most part was favourable for wine. Initially a prolonged winter retarded vegetation, which quickly caught up, however, when the weather rapidly improved in April. This resulted in strong vine growth. A dry May favoured early flowering. July was cool with only a few sunny days. There were more, however, in the wine-growing areas of eastern Austria than in the rest of Western Europe. At the end of August a short period of rain arrived just in time. Grape maturity was about 14 days ahead of normal, and harvesting could legally begin in Lower Austria (Niederösterreich) and Burgenland. In Styria (Steiermark) the harvest began on 4 September. In contrast to the previous year there was high-quality *Prädikatswein*. Compared with the powerful '92 vintage, which was low in acidity and high in alcohol, the new wine had more fruit than power, more elegance than substance, accompanied by a harmonious acidity. Red wines showed similarities to their counterparts of the unusual '92 vintage. At 1,865,000 hl the harvest was some 723,000 hl lower than in the previous year. With 1,438,00 hl, white wine accounted for 77% of the total harvest and red wine (428,000 hl) for 23%.

1992

Following a mild winter, early budding and good flowering, the summer was extremely hot and dry. Expectations for the harvest dropped, the must weights were generally above average. Due to a lack of *Botrytis*, grapes for fine *Beerenauslese* and *Trockenbeerenauslese* wines could not be harvested. The harvested volume was not quite 2.6 million hl. Towards the end of the year there were ideal conditions for *Eiswein* production. Wonderfully high quality sometimes contrasted with low volume.

1991

The good quality of the harvest was similar to the previous year, while quantities were only a bit smaller. Volume and quality were in fairly good balance in all the wine-growing areas.

1990

Favourable weather conditions resulted for the most part in a good grape harvest in terms of both quantity and quality. While there were often large differences, the wines had harmonious acidity and pleasant fruit. The red wines were dense and of intense colour.

1989

Early budding, delayed flowering and a rather rainy summer was followed by a cool, early autumn and finally a magnificent Indian summer. The weather was full of contrasts. Despite a generally mediocre primary ripening there were piquant and healthy wines and quite remarkable *Prädikat* wines.

1988

A mild winter, a dry hot summer with heavy rainfall towards the end, as well as a dry, warm autumn permitted many winegrowers to bring in a generous and fine grape harvest. There were also many *Prädikat* wines.

1987

Severe winter frost damage early on decimated the expected harvest yield. In the first half of the vegetative period the weather was not optimal. But a warm, wet July and a fine autumn helped produce a good and fruity vintage with pronounced acidity. The volume was low.

1986

An outstanding vintage with optimal acidity, marked varietal bouquet and high extract levels. One of the greatest red-wine vintages; there was also great *Eiswein*. The volume remained below average.

1985

This was the smallest harvest for decades as a result of many factors: winter frost, poor blossoming and regional hail. Nevertheless, the wines were full-bodied, fruity and of pronounced varietal character.

1984

Following a number of good vintage years the vineyards were exhausted. The vegetative period got underway late and slowly. This was followed by a cool and dry summer. Both in terms of quantity and quality, the vintage was barely average.

1983

Vegetative progress was affected by a mild winter, early budding and a hot, dry summer. The wines were very full-bodied, rather mild, but still fruity with a pronounced bouquet. This was a year with many, great *Prädikat* wines, but fruit acids were often lacking.

1982

With 490 million litres of wine this year saw the biggest volume in Austria's history. There were no great wines, but some perfectly drinkable ones.

1981

There was severe winter frost damage resulting from poor vine maturity and very low temperatures. A cold weather front moving in at Easter froze the young shoots in some areas. Thus harvest volume was low even though most grapes attained excellent maturity. There were fine red and *Prädikat* wines, but because of the low acidity, white wines were often only mediocre.

1980

Unfavourable weather conditions in the spring caused late budding and severely retarded flowering. This was not a good vintage year, resulting for the most part in wines of only modest quality. But an early frost permitted production of *Eiswein*. After relatively long ageing, some wines were of surprisingly high quality thanks to the excellent acidity structure.

1979

Fairly long periods of cold weather and a spring that was wetter than average resulted in late vegetative development. But a prolonged period of fine weather with high temperatures in early summer resulted in very rapid and powerful budding. Very

favourable for the grapes were also the above-average warm and dry months of September and October. The 1979 vintage had outstanding qualities.

1978

Because of good vine maturity, the vineyards wintered without any substantial frost damage. Budding was late. Because of cool weather, flowering was also delayed. The grapes were general healthy, but the Styrian harvest suffered from severe hail damage. The main harvest was very late and resulted in particularly high yields. Because of the generally low ripeness of the grapes, 1978 was a small vintage year despite the big crop.

1977

The vines wintered without damage. Because of a period of very warm weather in March, conditions were favourable for budding. A sudden onset of cold weather at the end of April caused considerable damage to the young shoots. In May and June the prevailing weather was sunny and warm, encouraging rapid growth and excellent flowering. The grapes were particularly healthy, must weight was above average, and *Botrytis* did not develop. This vintage produced fruity, fully ripe and harmonious wines with pronounced varietal character.

1976

Wintering was good as a result of a generally mild winter. Because of cool weather at the beginning of May budding was delayed, but afterwards growth quick and powerful. Favourable weather conditions resulted in good flowering, but severe drought retarded the development of the berries. Changeable weather impaired the ripening of the grapes but favoured *Botrytis*; resulting in the production of *Prädikat* wines over wide areas. This vintage was quite variable in quality, ranging from thin to elegant and expressive wines.

1975

Because of the extremely mild winter, the sap began to rise early. Budding was good and uniform. After a fairly long period of inclement weather, a short fine spell led to good flowering. Frequent hail damaged the harvest in Styria. Because of the wet and foggy weather, the volume of *Beerenauslese* and *Trockenbeerenauslese* wines was smaller than in good vintage years. In general, the wines were of average quality, fruity and with an intensive bouquet.

1974

Because of the mild winter, vegetation developed about three weeks earlier than normal, but this lead was lost due to the abnormally dry weather in April and May. Wet and cool weather followed after flowering and delayed development of the grapes. A period of fine weather in August and September allowed the vegetation to partially make up the deficit. Because of the unfavourable weather, 1974 was a vintage of small and often immature wines.

1973

The vineyards wintered well, fruit setting was good, and flowering also proceeded satisfactorily. Because of favourable weather, the harvest was earlier than in normal years. Continuous, heavy precipitation resulted in a massive *Botrytis* infection. The 1973 vintage was excellent to outstanding with full-bodied wines rich in extracts. In addition to top-quality *Prädikatswein* in Burgenland, there were also outstanding *Spätlese* and *Auslese* wines in the Wachau and Gumpoldskirchen.

1972

After wintering well, the vineyards produced a good budding. Both fruit setting and flowering were good. The ripening of the grapes was delayed by the unfavourable weather in the summer. The main harvest did not begin until mid-October and, because of the heavy early frost, there was considerable loss of quality. A weak vintage with small and often thin wines, low in extracts.

1971

Winter frost caused light damage several times. The weather remained dry all summer, resulting in poor grape formation with low juice. Not until the end of September was there significant precipitation to make the grapes somewhat juicier. The wines were rich in extracts and were marked by a high degree of maturity and great harmony.

1970

Because of wet and cold winter weather, budding was delayed. Flowering was also later than normal but proceeded satisfactorily. A period of inclement weather with a significant drop in temperatures also substantially delayed ripening of the grapes. Cool weather also continued during the harvest, and in mid-October there was an early frost. The wines of this harvest were for the most part of only mediocre quality.

1969

A long winter, which delayed the development of the vegetation, was followed by a very hot May, which led to good budding and setting of the fruit. Very summery, dry weather led to heat damage in some areas. Following a rather prolonged rainy period, fine weather set in, permitting a smooth grape harvest. The 1969 vintage produced wines of very high quality. The *Prädikat* wines were particularly outstanding, both in volume and quality, with a sugar content as high as 50° KMW.

1968

In January there was severe frost damage, but by February there were springlike temperatures that accelerated vine pruning. The spring was relatively dry and warm. In the summer and autumn, however, it was very cool and damp, leading to a *Botrytis* infection of the early varieties. The harvest was of varying quality. Because of the varied crop, this vintage produced a number of downright top-quality wines as well as others that were somewhat problematic.

1967

Budding was good and uniform, and flowering also occurred without problems. In July and August, however, hail damaged the vines, especially in Styria. In the months of August and September there was damage due to dry weather. From mid to late September there was lots of rain, causing severe rotting of the grapes and prompting an early start to the harvest. In Burgenland this decay often developed into noble rot, producing must readings between 45° and 50° KMW.

1966

Very early spring weather followed a short winter and favoured development in the vineyards. Fine weather prevailed into early summer with occasional light rain. In the months of July to August extremely high precipitation in conjunction with cold temperatures delayed development. But with few exceptions, the grapes harvested at the beginning of October were in outstanding condition. This vintage had generally high sugar content, but the low acidity had a detrimental effect. The vintage year must be considered only mediocre.

1965

Because of a prolonged winter, budding and flowering were delayed. In some places the poor weather conditions caused *Peronospora* (downy mildew) infection, while in Styria there was damage caused by hail. The beginning of dry weather in October resulted in a certain ripening of the grapes. This vintage produced immature, small and thin wines and was one of the worst vintages in terms of quality.

1964

There was no winter damage. Flowering was favourable without losses due to blossom drop. Fruit setting was above average, raising expectations of a large crop. The harvest, however, was impaired by constant rain. The harvest was the biggest in Austrian history, and despite the large volume, the wines for the most part were of high quality and suitable for ageing.

1963

The winter began early and was severe and very long. This led to severe damage to the vines. Pruning did not get underway until the end of April, but by the end of May grape development was very advanced. A prolonged dry spell began in July. At the end of August there was sufficient rain for the berries to develop noticeably, but there was grape rot in some areas. Because the harvest was begun late and the weather was fine, the volume was large and the quality high. In some cases the must readings were as high as 42° KMW. This was a good to excellent vintage with outstanding *Prädikat* wines, especially in Burgenland.

1962

Encouraged by the weather, vegetation and budding began early. But because of very wet and cold weather from Easter to mid-July, flowering was late with heavy losses due to blossom drop. A dry spell followed with occasional thunderstorms that caused severe damage due to hail and flooding. The harvest began very late. Apart from the Wachau, this vintage was of only mediocre quality.

1961

Because of mild winter weather, pruning began early. Budding was excellent. Very cold and rainy weather began in May and lasted for some time, causing part of the fruit to atrophy. In addition there was severe rain damage. In August a dry spell began, which lasted throughout the harvest. Because of the drought, the vines could not take advantage of the late autumn sun. In general the wines were of low acidity.

1960

The winter was without frost damage. Budding, however, was very uneven. Because of the favourable weather, flowering was generally good. In several areas disease and pests resulted in an early harvest. The fine and frost-free autumn provided opportunities for improving quality. A particular problem was a plague of starlings. The year 1960 produced wines of mediocre to average quality.

1.8 Assessment of the 2004-1992 Vintages

Year		Wachau, Kremstal, Traisental	Kamptal, Donauland	Weinviertel	Carnuntum, Thermen- region	Burgenland	Steiermark	Wien
2004	white	16	16,5	16	16,5	17,5	15,5	16
	red	-	-	-	17,5	18	-	-
	sweet	-	-	-	-	-	-	-
2003	white	18,5	18,5	18,5	17,5	18	18	17
	red	-	-	18,5	19,5	-	-	-
	sweet	-	-	-	-	-	-	-
2002	white	17,5	17,5	17,5	18	17	17	16,5
	red	-	-	-	18,5	18	-	-
	sweet	-	-	-	17	18	-	-
2001	white	17,5	17,5	16,5	17	16	17,5	16,5
	red	-	-	-	17	16,5	-	-
	sweet	-	-	-	16,5	17	-	-
2000	white	18	17,5	17	18	16,5	18	16,5
	red	-	-	17	19	19	-	-
	sweet	-	-	-	-	-	-	-
1999	white	19	18	17	17,5	16,5	17,5	17
	red	-	-	16	17	18	-	-
	sweet	-	-	-	17,5	18	-	-
1998	white	17	17	16	16	16	16,5	16
	red	-	-	14,5	16	15,5	-	-
	sweet	-	-	-	17	17,5	-	-
1997	white	19	18	16,5	16	17	19	16,5
	red	-	-	16,5	17,5	18	-	-
	sweet	-	-	-	- **	- **	-	-
1996	white	14,5	15	14	15	15	15	14
	red	-	-	13	16	14,5	-	-
	sweet	-	-	-	16	16,5	-	-
1995	white	18	18	16,5	16,5	17	16,5	16
	red	-	-	14	15	15	-	-
	sweet	19 *	-	-	19,5	20	-	-
1994	white	16	16	15	14,5	15	16	16,5
	red	-	-	15,5	16,5	17,5	-	-
	sweet	-	-	-	- **	15	-	-
1993	white	17,5	17,5	16,5	16,5	16	18	17,5
	red	-	-	15	16,5	18	-	-
	sweet	-	-	-	17,5	18	-	-
1992	white	16,5	16,5	15	16	15,5	17	16
	red	-	-	16	16,5	17,5	-	-
	sweet	-	-	-	16	15,5	-	-

Key

* Sweet-wine vintage in a wine-growing area that is otherwise of no importance in this sector.

** No sweet wines from this vintage in quantities worth mentioning.

Bold figures **Not yet developed, still ageing.**

Normal figures Drink now or continue to age.

Italic figures *Drink soon, perhaps already past its prime.*

Source: *A Guide to Austrian Wines (Österreichischer Weinführer)* by Dr. Viktor Siegl and Dr. Rudolf Steurer, revised by V. Siegl, 2005

2 The Austrian Wine Industry

2.1 Economic Importance of the Wine Industry in Austria

The organization Statistik Austria is responsible for the Federal Agriculture and Forestry financial balance (Land- und Forstwirtschaftliche Gesamtrechnung) as of 2003. Due to a fundamental change in the calculation, the statistics cannot be directly compared to the statistics of the Economic Research Institute (Wirtschaftsforschungsinstitut) from previous years.

The development of the national incomes from agriculture and forestry in the past years can be seen in the table below:

Production Value and Factor Income for Agriculture in the Year 2004¹⁾				
	2002	2003	2004	Veränderung gegenüber Vorjahr
	Mio. €			%
Output of horticulture and crops at production cost	2.585	2.626	2.666	1,5
Grain ²⁾	724	731	715	-2,1
Commercial plants ³⁾	251	250	252	0,6
Vegetable and garden produce ⁴⁾	388	370	366	-0,9
Fruit	258	314	296	-5,8
Wine	446	475	499	5,2
Other ⁵⁾	518	486	537	10,6
Output of livestock and livestock products at production cost	2.582	2.523	2.610	3,4
<i>Livestock</i>	1.523	1.518	1.563	3,0
Cattle, calves	746	762	753	-1,1
Hogs	605	583	636	9,0
Poultry	118	122	121	-1,0
Other animals ⁶⁾	54	51	54	5,0

<i>Livestock products</i>	1.058	1.005	1.047	4,2
Dairy	887	830	869	4,7
Eggs	129	134	139	3,7
Other livestock products ⁷⁾	43	41	39	-5,3
Agricultural services				
Non-separable farm-related income	148	146	161	10,2
Output value of agriculture at production cost	402	383	367	-4,3
- Advance payments	5.716	5.678	5.804	2,2
= Gross value added at production cost	3.018	2.995	3.053	1,9
- Cash expenses	2.698	2.684	2.751	2,5
= Net value added at production cost	1.351	1.346	1.365	1,4
- Other production expenses	1.347	1.337	1.386	3,6
+ Direct government payments and other subsidies	87	89	87	-3,2
= Net factor income for agriculture	1.154	1.173	1.204	2,6
1) net- 2) all grains including corn - 3) oil crops, protein crops, sugar crops, tobacco, other commercial plants. - 4) vegetables, nursery plants, flowers und decorative plants, cultivation. - 5) feed crops, potatoes, and other crops. - 6) sheep and goats, hoofed animals, game. - 7) honey, wool Source: Statistik Austria, preliminary values				

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The Definition of the Agricultural Income in the Federal Agriculture and Forestry Financial Balance

The agricultural income as defined by the Federal Agriculture and Forestry financial balance is the farm and farm-related income derived from activities within a specified accounting period, even if this income is received at a later time. This therefore does not reflect the actual received income within the accounting period. Because the Federal Agriculture and Forestry financial balance data includes farm and farm-related income only and not income from other off-farm sources (non-agricultural earnings, wages, welfare, social security, interest, dividends, etc.), statements over the development of the total income or disposable income of farm households cannot be made.

The central income parameters of the federal agriculture and forestry financial balance are the net values at factor cost (factor income) and the index of real factor income of agriculture per annual labour unit (called *indicator A* by Eurostat).

The factor income is calculated by taking the value of agricultural output at production cost minus advance payments, cash expenses, and other production expenses, plus direct government payments and other subsidies. Farm inputs such as real estate, capital, labour, and materials are absent from the calculation and thus the value represented is the sum of the value of the commodities produced on farms.

The *indicator A* represents the real (deflated) net value of the agricultural economy at production cost per annual labour unit. Deflation of commodities is calculated according to the Eurostat Handbook with market prices using the implicit GNP price index.

	Farm output
-	Advance payments
=	Gross value added at production cost
-	Cash expenses
=	Net value added at production cost
+	Direct government payments and other subsidies
-	Other production expenses
=	Net value at factor cost / factor income deflated with relation to the annual labour unit Indicator A

Annual Labour Unit

The Calculation of Farm Labour in the Framework of the Federal Agriculture and Forestry financial balance:

In order to reflect labour in agriculture, including part-time and season labour, annual labour units are calculated. One annual labour unit is the equivalent of the farm labour of one person working full-time an entire year. In the calculation of the annual labour unit, it is differentiated between paid and unpaid labour and the average of the two comprise the annual labour unit.

Source: Statistik Austria / www.statistik.gv.at

2.2 Grape Harvests 1960-2004

Grape Harvest 1960-2004						
Year	Total in hl	Average in hl/ha*	NÖ in hl	BGLD in hl	STMK in hl	WIEN in hl
1960	897,500	29.1	no figure	no figure	no figure	no figure
1970	3,096,100	74.0	no figure	no figure	no figure	no figure
1978	3,366,278	69.2	1,851,104	1,390,224	91,268	33,682
1979	2,773,006	57.0	1,773,316	875,799	89,469	34,395
1980	3,086,422	57.2	1,984,465	967,130	101,795	33,032
1981	2,085,168	38.0	1,093,085	903,104	67,107	21,872
1982	4,905,651	88.1	3,050,837	1,663,511	143,979	47,324
1983	3,697,925	66.4	2,316,795	1,248,601	98,039	34,490
1984	2,518,918	45.6	1,461,392	927,553	109,057	20,916
1985	1,125,655	21.0	438,409	603,623	68,018	15,605
1986	2,229,845	40.8	1,144,972	936,186	124,925	23,709
1987	2,183,623	40.6	1,131,654	748,259	98,965	22,659
1988	3,502,457	65.1	1,967,369	1,398,647	110,289	25,936
1989	2,580,861	47.7	1,520,179	930,467	109,652	20,395
1990	3,166,290	57.6	1,717,299	1,291,974	133,571	23,230
1991	3,093,259	56.2	1,858,737	1,070,231	135,127	28,967
1992	2,588,215	48.3	1,599,132	842,682	125,865	20,087
1993	1,865,479	37.0	1,238,341	452,249	150,668	23,909
1994	2,646,635	53.0	1,665,645	800,098	150,211	23,089
1995	2,228,969	45.9	1,359,105	739,084	111,077	19,056
1996	2,110,332	43.5	1,394,962	547,433	133,481	28,377
1997	1,801,430	37.8	921,032	713,351	148,546	18,501
1998	2,703,170	56.4	1,609,853	932,430	137,238	23,268
1999	2,803,383	58.5	1,865,223	781,120	139,361	17,281
2000	2,338,410	44.1	1,491,605	678,372	156,250	11,478
2001	2,530,576	54.8	1,545,328	777,925	186,025	20,584
2002	2,599,483	56.5	1,665,325	734,677	179,317	19,515
2003	2,529,894	60.1	1,512,916	839,027	163,131	13,529
2004	2,528,475	58.1	1,640,846	703,365	499,828	17,436

Source: Statistic Austria, Federal Ministry for Land and Forestry, Environment, and Technology (BMLFUW),
Fast Report 2005

* calculated on the basis of the productive vineyard area in ha

The following is a comparison of harvest development since 1960 (Share in %):

	1960	1970	1980	1990	1994	1997
White wine	87.1	88.0	84.1	80.9	81.4	70.9
Red wine	9.2	11.2	15.8	19.1	18.6	28.5
	1999	2000	2001	2002	2003	2004
White wine	74.7	71.2	69.5	72.0	63.5	64.9
Red wine	25.3	28.8	30.5	28.0	37.5	35.1

* rounded, Source: Statistics Austria and BMLFUW, Fast Report 2004

Grape Harvest 2004

Feder State	Number of wine-growers	Productive Vineyard Area in ha	Tafelwein		Landwein		Qualitäts- and Prädikatswein		Other products *)		Total	
			White	Red	White	Red	White	Red	White	Red	White	Red
Bgld.	7.286	12.819	48.712	27.325	11.404	10.104	310.037	390.845	17.252	4.085	387.405	432.359
NÖ	14.398	26.871	217.929	27.331	73.919	21.134	928.644	432.020	18.011	5.034	1.238.503	485.519
Stmk.	3.254	3.471	3.909	2.434	12.194	4.393	110.995	29.669	2.527	1.200	129.625	37.696
Wien	242	352	1.104	262	2.190	337	13.815	4.034	624	67	17.733	4.700
Kärnten	17	3	6	1	2	2	29	18	0	0	37	21
ÖÖ	12	6	5	10	35	9	95	126	30	6	165	151
Tirol	5	7	0	0	0	0	141	223	0	0	141	223
Vbg.	10	9	0	0	5	19	117	43	1	0	123	62
Sbg.	3	2	0	0	0	0	48	50	0	0	48	50
Gesamt	25.227	43.540	271.665	57.363	99.749	35.998	1.363.921	857.028	38.445	10.392	1.773.780	960.781
			329.028		135.747		2.220.949		48.837		2.734.561	

*) incl. Grape must concentrate, rectified

Source: BMLFUW and Statistics Austria; fast report February 2005

At 2,734,561 hectoliters, the 2004 wine harvest is 8% more than the previous year and above the long term average of 2.5 million hectoliters. White wine comprised 1.773.780 hectoliters (63.3%) and red and rosé wines 960,781 hectoliters (36.7%).

Particularly large quantities of red wine were harvested in Lower Austria resulting in Lower Austria producing more red wine than Burgenland. Despite this only 27% of Lower Austria's harvest was dedicated to red wine, while red wine in Burgenland made up 53% of the total harvest. White wines continue to dominate Vienna and Styria.

2.3 Qualitätswein (Quality wine) in Austria 2004

Statistics – State Inspection Numbers (1/2004 – 12/2004)

Number of state inspection numbers issued:	32.087	
Number of rejections, refusals, reversals:	6.227	
Number of withdrawals:	29	
Number of applications in 2003:	37.800	
Growth rate of applications (basis 1.1.2002-31.12.2002):	5,25 %	
Number of wine-growers making application:	6,048	
Cost of inspection according to tariff (in €):	2.107.648,18	
Inspection costs passed on (in €):	1.153.534,41	54,73 %

Breakdown of State Inspection Numbers by Volume (in hl)

In the 2004 calendar year state inspection numbers were issued for a total of 1,332,736 hl of wine. White wine accounted for 804,184 hl (60.34 %), red wine for 512,733 hl (38.47 %) and rosé wine for 15,819 hl (1.19 %).

Breakdown according to Wine-growing Regions and Wine-growing Areas

	Volume in hl 2004	+/- 03/04	Volume in hl 2003
Weinland			
Burgenland	327.543	47,63	221.871
Mittelburgenland	80.253	31,42	61.067
Neusiedlersee	112.234	16,34	96.475
Neusiedlersee-Hügelland	38.873	15,10	33.773
Südburgenland	8.085	6,62	7.583
Niederösterreich	398.854	74,51	228.558
Carnuntum	17.294	11,02	15.578
Donauland	62.085	42,10	43.691
Kamptal	103.227	34,74	76.611
Kremstal	88.660	15,47	76.780
Thermenregion	38.430	22,32	31.419
Traisental	10.295	13,67	9.057
Wachau	72.288	20,52	59.979
Weinviertel	312.738	4,90	298.121
Steirerland			
Steiermark	12.360	31,19	8.505
Südoststeiermark	27.824	17,64	22.917
Südsteiermark	82.335	17,42	67.993
Weststeiermark	10.791	-8,51	11.709
Wien	7.617	8,82	6.945
Salzburg	k. A	0	0
Oberösterreich	22	-68,18	37
Kärnten	32	43,75	18
Tirol	20	100,00	0
Vorarlberg	156	-14,10	178
Total in hl	1.812.016	23,90	1.378.866

*) rounded, n/a not available

Breakdown by Wine Regions

	Volume hl 2004	% 2004	Volume in hl 2003
Weinland	1.670.859	24,556	1.260.564
Bergland	230	-1,739	234
Steirerland	133.310	16,642	111.124
Wien	7.617	8,822	6.945

Breakdown by Quality Levels

		2004	2003
		Volume in hl	Volume in hl
Qualitätswein	White	765.111	790.449
	Red	507.464	461.685
	Rosé	13.729	16.744
Kabinett	White	62.055	75.746
	Red	2.691	2.912
	Rosé	1.730	2.087
Spätlese	White	22.747	18.995
	Red	2.323	1.181
	Rosé	309	311
Auslese	White	4.579	3.112
	Red	164	65,0
	Rosé	11,0	20,0
Beerenauslese	White	2.603	2.152
	Red	35,9	19,5
	Rosé	4,0	25,6
Ausbruch	White	189	334
	Red	9,1	10,2
	Rosé	0	0
Eiswein	White	1.527	1.134
	Red	15,0	1,7
	Rosé	35,1	23,9
Strohwein	White	105	18,9
	Red	17,9	27,5
	Rosé	1,8	0
Trockenbeerenauslese	White	189	1.801
	Red	9,1	640
	Rosé	0	450

*) rounded

Breakdown by Variety

Grape Variety	Volume in l	Grape Variety	Volume in l
Blauburger	1.388.905	Müller Thurgau	5.835.941
Blauer Burgunder	634.431	Neuburger	1.581.683
Blauer Portugieser	4.072.297	Rathay	1.665
Blauer Wildbacher	1.008.631	Riesling	3.206.517
Blaufränkisch	14.597.124	Roesler	6.530
Bouvier	182.666	Roter Muskateller	3.460
Cabernet Franc	13.925	Roter Traminer	48.130
Cabernet Sauvignon	590.018	Roter Veltliner	276.225
Chardonnay	3.923.139	Rotgipfler	158.575
Frühroter Veltliner	493.329	Sauvignon Blanc	2.052.552
Furmint	12.800	Scheurebe	91.090
Gemischter Satz	334.179	St. Laurent	1.824.369
Gewürztraminer	224.235	Syrah	157.656
Goldburger	54.120	Sämling 88	543.907
Grauer Burgunder	309.665	Weißer Burgunder	689.991
Grüner Veltliner	68.231.720	Welschriesling	8.223.345
Jubiläumsrebe	3.375	Zierfandler	99.772
Merlot	300.768	Zweigelt	7.685.039
Muskat Ottonel	721.425	Sortenverschnitt Rot	1.165.804
Muskateller	525.291	Sortenverschnitt Weiß	136.635

Source: Federal Institute for Viticulture, Eisenstadt, 2004

Rejection analysis for federal inspection numbers for the reported year based on notification date

Total rejections: 6,198

Quantity in litres: 120,066,139

Sensory rejections from total: 5,668

Quantity in litres: 21,410,933

Source: Federal Institute for Viticulture, Eisenstadt 2005

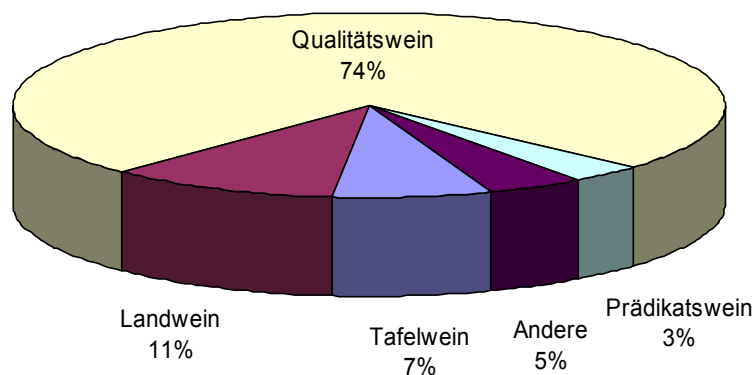
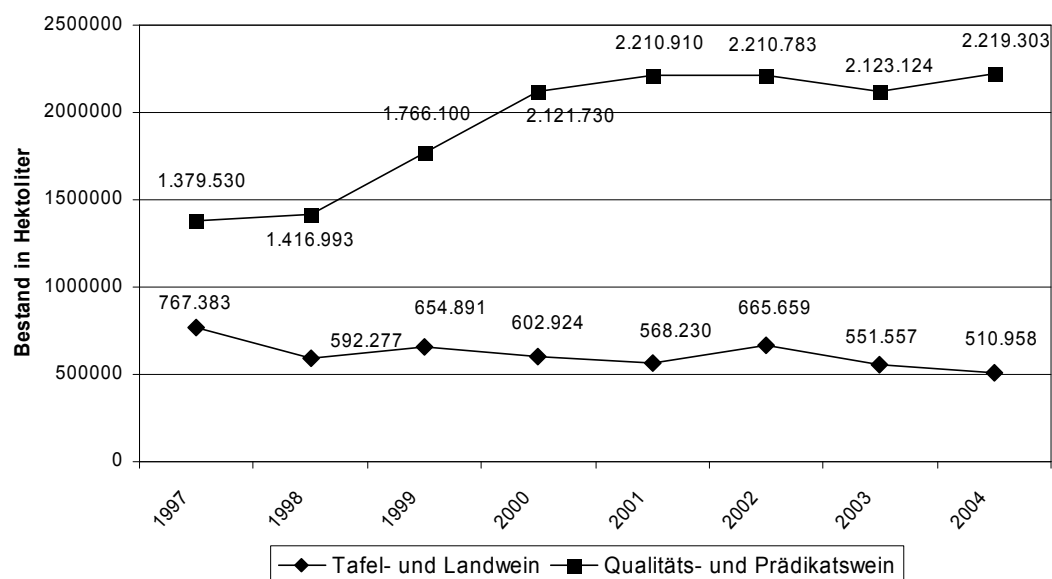
2.4 Austria's Wine Supply and Storage Capacity 2005

National wine inventory rose slightly in the year 2004 and at 2.86 million hectoliters was slightly over the average. A general shift in the composition of the total was observed, with an increase in quality wines and a decrease in table and country wines. The current inventory comprises 74.4% quality wines, 10.7% country wines, 7.1% table wines and 3.3% predicated wines. "Other products" comprise primarily Austria's sparkling wines.

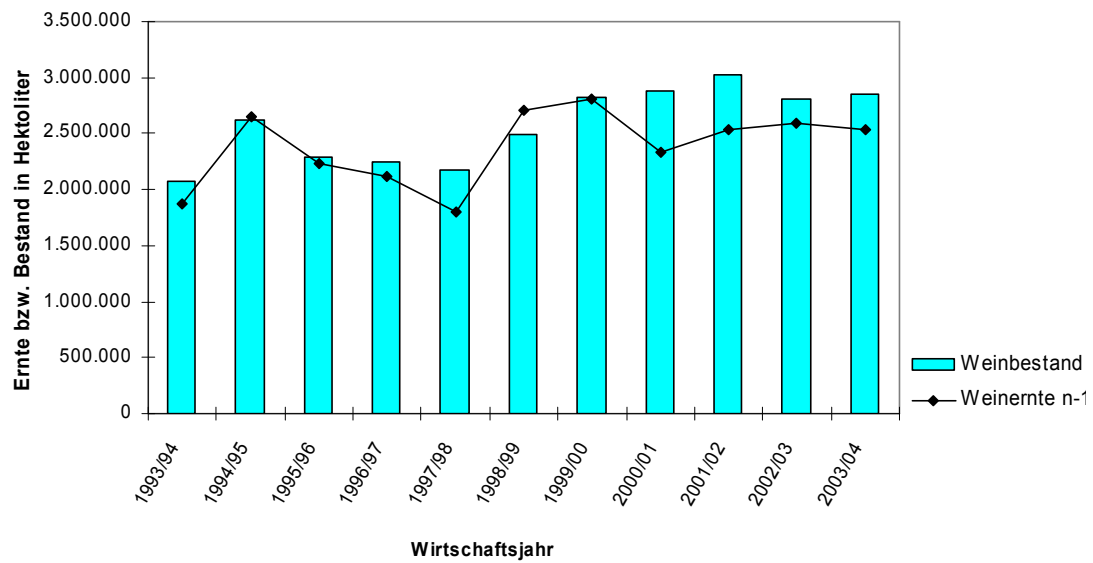
Federal States	Tafelwein	Landwein	Qualitätswein	Prädikatswein	Grape must concentrated
Burgenland	31,048	45,649	566,399	43,865	576
Carinthia	16	52	310	1	-
Lower Austria	140,277	212,107	1,486,743	29,723	1,462
Upper Austria	2,807	3,407	8,806	243	-
Salzburg	-	-	-	-	-
Styria	9,328	40,054	111,450	1,767	129
Tyrol	2,301	3,849	16,723	104	-
Vorarlberg	1,414	2,644	5,812	4	-
Vienna	48,395	4,902	27,327	477	30
Austria 2005	235,586	312,644	2,226,575	76,184	2.197
Austria 2004	204,443	306,515	2,125,108	94,195	2,487
Federal States	Grape must concentrated... rectified	Other products	Third-country wine	Total	
Burgenland	117	10.653	347	698.654	
Carinthia	-	94	3	476	
Lower Austria	581	34.646	5.597	1.914.136	
Upper Austria	-	3.973	-	19.236	
Salzburg	-	-	-	5	
Styria	18	7.751	95	170.592	
Tyrol	-	1.643	580	25.200	
Vorarlberg	1	996	201	11.072	
Vienna	17	105.134	-	186.282	
Austria 2005	734	164.890	6.823	3.025.653	
Austria 2004	884	118.003	4.674	2.856.309	

Volume in hl

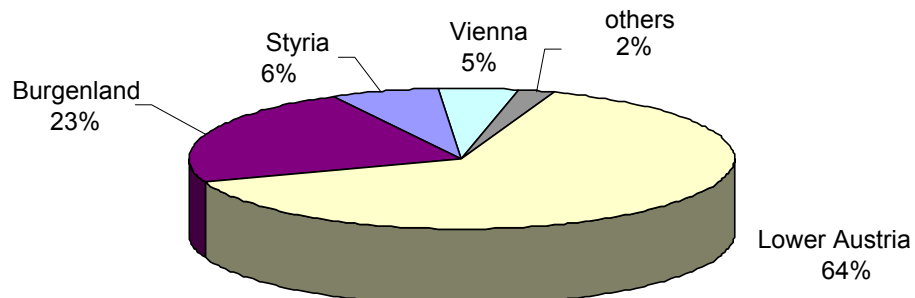
Source: Wine Inventory Report of the Provincial Governments (key date: 31/7/2005)

Share of products in the wine inventory 2004Inventory development of Tafel/Landwein and Qualitäts/Prädikatswein 1996 - 2004 in hl

Inventory in hl 1994 – 2004 compared to vintage 1993 - 2003



Inventory 2004– relative breakdown by Federal States



2.5 Development of Grape and Wine Prices

	1999		2000		2001		2002		2003		2004	
	Price in € *	Index 1998 = 100	Price in € *	Index 1999 = 100	Price in € *	Index 2000 = 100	Price in € *	Index 1998 = 100	Price in € *	Index 1999 = 100	Price in € *	Index 2000 = 100
Grapes. white. mixed**; kg	0.2282	76.6	0.2529	110.8	0.25	98.9	0.2282	76.6	0.2529	110.8	0.25	98.9
Grapes. red. mixed**; kg	0.2558	70.4	0.3648	142.6	0.49	134.3	0.2558	70.4	0.3648	142.6	0.49	134.3
Barrel wine. white. mixed**; litre	0.3466	56.3	0.2863	82.6	0.27	94.3	0.3466	56.3	0.2863	82.6	0.27	94.3
Barrel wine. red. mixed**; litre	0.4382	57.8	0.4869	111.1	0.58	119.1	0.4382	57.8	0.4869	111.1	0.58	119.1
Barrel: <i>Qualitätswein</i> . white	0.4041	**))	0.3503	86.7	0.33	94.2	0.4041	**))	0.3503	86.7	0.33	94.2
Barrel: <i>Qualitätswein</i> . red	0.5312	**))	0.6061	114.1	0.79	130.3	0.5312	**))	0.6061	114.1	0.79	130.3
2-litre bottle. white. mixed**; litre	1.6569	108.3	1.6555	99.9	1.73	104.5	1.6569	108.3	1.6555	99.9	1.73	104.5
2-litre bottle. red. mixed**; litre	1.7122	111.8	1.7267	100.9	1.83	106.0	1.7122	111.8	1.7267	100.9	1.83	106.0
Bottles. white; 0.75 litre	2.9374	102.0	3.0370	103.4	3.14	103.4	2.9374	102.0	3.0370	103.4	3.14	103.4
Bottles. red; 0.75 litre	2.9062	98.2	3.1053	106.9	3.26	105.0	2.9062	98.2	3.1053	106.9	3.26	105.0

*) in EUR excluding VAT

**) mixed grapes from the same vineyard

***) no data available

source: Statistics Austria

Austrian wine market

Average prices – barrel-wine (September 2004)

Land	€ price per litre (net)
NIEDERÖSTERREICH	
Qualitätswein (white)	0.29– 0.34
Qualitätswein (red)	0.29 – 0.35
BURGENLAND	
Qualitätswein (white)	0.30 – 0.32
Qualitätswein (red)	0.30 – 0.32

Source: Der Winzer 9/2005

2.6 General regulations for wine production

Austria's Wine Industry – Structural Change

In the last 20 years the small world of Austrian wine has markedly changed and opened. Various wines and origins have differing images, not only in Austria, but also abroad (see Nielsen Brand Tracking Statistics).

According to structural statistics from 1999 there are currently 32.000 farms with vineyards in Austria. Only around 2.500 of these grape growers have 5 ha of vineyards or more. The advantages and disadvantages of this incremented structure will be analysed later. A small-structured wine grape production can generally be documented in the entire EU although the acquisition of data through market organizations varies among the different countries.

On a ten-year average, Austria's annual production has been 2.5 million hl of wine grown on an area of approximately 48.000 ha. The quantity produced in the years 1995, 1996 and 1997 was far below this average. The 1998 and 1999 harvests were significantly larger than the yearly average. The 2001 harvest was just under the average.

A comparison with the EU clearly illustrates Austria's position: within the Community there are approximately 3.5 million ha of active vineyards, resulting in an average annual production of 170 million hl of wine. The position of the biggest producers in the Community – France (914.000 ha, average annual production 60 million hl) and Italy (909.000 ha, 58 million hl) – is best described as “world-market dominance”. While Spain has the largest viticultural area in the Community (1.18 million ha), because of its low average yield per ha it produces “only” around 33 million hl of wine annually (source: OIV, 1999).

At present, Austria's vineyards are planted with c. 75% white-wine vines and c. 25% red-wine varieties, although the tendency is towards a higher percentage of red-wine vines. Austrian red wines attained a level that holds up to comparison with the finest international wines. The Zweigelt has attained a definite position of leadership among the red-wine varieties, while another indigenous variety, the Blaufränkisch, has retained its position.

In the white-wine sector, Styria demonstrated in the 1990's that the Sauvignon Blanc grape is perfect for this wine-growing area. Because of this, its success is expected to spread to the other Austrian regions as Chardonnay slowly subsides.

Among the trend-setting wine-growers, production of the white “Burgundy family” is being accelerated in Burgenland, while Niederösterreich (Lower Austria) continues to produce more Grüner Veltliner and Riesling.

Among the appr. 6.000 wine-growers who bottle their wines, a society of several classes has become established on the Austrian market. Roughly speaking, it can be divided into a “three-class society”. In the “upper class” as it were are the top wine-growers who consistently win awards at the numerous wine competitions and good marks in the various wine guides. They can easily sell their products even in average vintage years. Within this elite, marketing has become diversified. Some of the top producers have gradually halted the practice of direct marketing, which used to predominate. In addition, several wine-growers from the “middle class” have managed to move up – often via the “Salon of Austrian Wine”. This “middle

class” is composed of producers who consistently market their own wines but nevertheless also (have to) sell some of them in one- or two-litre bottles.

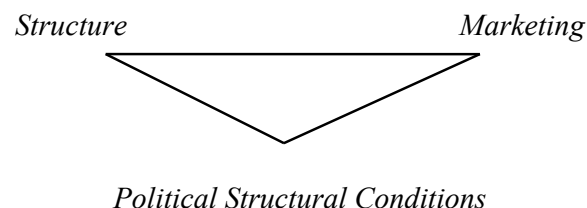
The “lower class” is composed of producers, who sell wine almost exclusively in two-litre bottles and (part of) their production in bulk. Things have become difficult since the 1998 harvest for those wine-growers who sell exclusively in bulk and for grape vendors who have no wineries of their own. Both groups saw new confirmation of the necessity for a close and permanent relationship with wine co-operatives or the wine trade in order to obtain reasonable prices in the long term. A brief commentary on the trend for Austrian barrel-wine prices follows.

The small harvests of 1995, 1996 and 1997 led to a supply shortage and loss of market share for Austrian wine on the domestic market. In the spring of 1998 the barrel-wine prices were around EUR 0.73 for white wine and EUR 1.1 for red.

The following normal harvests of 1998, 1999, 2000, 2001 and 2002 resulted in a decline in barrel-wine prices. For lower levels of white *Qualitätswein*, *Landwein* and *Tafelwein* this situation has still not changed – the lowest prices for white wine are around EUR 0.25 (August 2003). But there are possibilities for specialisation even when there is a surplus on the barrel-wine market. Selected *Qualitätswein* of the varieties Rhine Riesling, Sauvignon Blanc, Chardonnay as well as Grüner Veltliner of the best origins can be sold for markedly higher prices. Austrian red wine, even of the simplest quality, fetches prices of more than EUR 0.70 – 0.80.

Alongside the conversion of vineyards supported by the EU (see Variety adjustment programme) and distillation, the only thing that in the long term can improve this situation, which is hardly satisfactory to any of the affected parties, is a clear restructuring of the barrel-wine supply (DAC wine, *Qualitätswein* with designated origin, *Landwein* and *Tafelwein*). This will be a priority responsibility for the regional wine committees.

The Bacchus Study 2000, which is a concrete analysis of the Austrian wine industry from the year 1994, clearly depicts the problems of the Austrian wine industry in form of "problem-triangle".



Structural deficits are created by:

- *the low average business size of the wine producers and marketers*
- *the high share of barrel-wine sales without contractual relationships with marketers*
- *the large fluctuation in the size of harvests*

Marketing weakness is expressed in:

- *product and producer brands that are lacking in prominence*
- *low access to efficient international sales channels*
- *lack of international companies in the Austrian wine industry*

Source: BACCHUS STUDY 2000. Vienna. 1994

Even though the findings of the Bacchus Study 2000 still retain a certain validity, positive tendencies can be clearly seen in a number of areas.

- Political structural conditions
The repeal of the tax on alcoholic beverages has to a great extent evened out competitive conditions within the wine industry.
- Structure
The problems that are found in the structural area of the domestic wine industry can be solved primarily by shifting vineyards to areas less susceptible to frost, shutting down some wineries, merging vineyards, or farming them as a secondary occupation. The Austrian programme of vineyard conversion addresses these problems in a number of ways (see also Chapter 1.3)
- Marketing
The establishment of regional Wine Committees will permit the definition of common brands for origins. After their establishment, they will help to even out the existing lack of profile with respect to brands for products and producers.

2.7 EU-Measures for the Restructure and Adjustment of Vineyards

Under the EU measures for “Adjustment of Production to Demand” or the EU measures for “Improvement of the Vineyard Area Cultivation Technique” (in Austria often simply referred to as “Adjustment Measures”), 8,000 applications for more than 6,700 vineyard hectares as well as 2,100 ha of irrigation, 97,000 meters of embankment enforcement, 39,000 m² of walled terraces and 4,300 ha of pulled vines, together comprising a total worth of 53 million euros were accepted. This means that 10% of the Austrian vineyard area has already profited from these improvement measures. According to cautious estimates 95%-100% of the funds allotted Austria have thus been utilized, but because adjustment measures will continue to be a permanent part of GMO wine, it can be expected that future funds will be budgeted.

Analysis of the grape variety balance (vines planted minus vines pulled) of all vineyard adjustment applications to date show that the Austrian vineyard area dedicated to red wine varieties has increased by 4,000 ha (Zweigelt +2,100 ha, Blaufränkisch +580 ha, St. Laurent +340 ha, Merlot +330 ha). The white grape varieties show a slight decrease of -460 ha with -800 ha Grüner Veltliner and -250 ha Müller Thurgau, and increases in Chardonnay (+250 ha), Sauvignon Blanc (+240 ha), and Riesling (+160 ha). The quantity of Welschriesling remains virtually unchanged, while 810 ha of mixed vineyards (Gemischter Satz) were pulled.

Red wine demand: For years Austria has produce red wine and white wine in a percentile ratio of 25 to 75, yet consumption has shown a ratio of 45 to 55. Mathematically calculated, there has been the demand for an increase of 5,000 to 7,000 ha of vines dedicated to red wine production, a demand which has successfully been met through adjustment measures. At the end of the adjustment measures in 2005 the production ratio of red wine to white wine will be at least 30 to 70.

More information can be obtained from Dr. Rudolf Schmid, BMLFUW, Tel. +43 01 71100

2.8 The Austrian Wine Committees

The establishment of interprofessional committees has a long tradition in many of the classic wine countries, particularly in France. All sectors of the wine branch in each region work together on a committee for an optimal economic solution. After extensive discussions and assessment procedures, the Austrian Federal Minister for Agriculture, Forestry, Environment, and Water Supply signed the decree for the establishment of interprofessional committees in the wine branch. This decree meets the long-time wish of the Austrian wine branch for the instalment of such organizations.

The fundamental level of the organization of interprofessional wine committees is regional.

Regional Wine Committees

Regional wine committees are made up of representatives of the essential sectors of each respective region's wine branch. Not only are the interests of merchants, grape growers, and

bulk wine producers represented, but also those of small vintners and large well-marketed wineries. Together it is their responsibility to fulfil the following tasks:

- The primary task is to analyse the specific areas and enhance the coordination of sales. This can include general contract agreements like supply or operational contracts.
- Marketing measures for specific regional needs can be agreed upon with the Austrian Wine Marketing Board. The Austrian Wine Marketing Board's budget has been drastically increased to support regional advertising.
- If a regional committee agrees that it distinguishes the regional identity, D.A.C. specifications can be established for typical quality wines with geographic origins according to federal outlines.

National Wine Committee

The National Wine Committee serves as an administrative filter between the resolutions of Regional Wine Committees and the Federal Ministry for Agriculture, Forestry, Environment, and Water Supply. Specific responsibilities of the national wine committee include:

- The national wine committee must verify that the proportion of the nominated members of each regional committee reflects the market significance of the diverse regional branch sectors.
- The national wine committee must ensure that the regional committees' establishment of D.A.C. wines and other resolutions are in the general interest of the Austrian wine industry.

The national wine committee is appointed by the Federal Minister for five years and consist of:

- Nine members from the wine production sector as nominated by the President Conference of the Agricultural Commerce Chamber, whereby at least two members must be representatives from wine producing cooperatives.
- Nine members of the wine trade sector as nominated by the Federal Chamber of Commerce, whereby at least two members must be representatives from the sparkling wine production.
- In addition there are members with consulting functions without voting rights that advise members and carry out committee resolutions in their various positions. These consulting members consist of one expert from each of the wine producing provinces from the Ministry of Agriculture, one expert each from the Agricultural Commerce Chamber and the Federal Chamber of Commerce, as well as the director of the Austrian Wine Marketing Board Ltd.

It is essential that the National Wine Committee has a balanced membership from all sectors of the wine branch. The committee should serve as a platform for listing and discussing all appropriate options for improving and enhancing the marketing of Austrian wine. Although quality wines are the main focus, Austrian land wine and sparkling base wines are also a responsibility.

The central element of the interprofessional committees remains with the Regional Wine Committees. The Regional Wine Committees play the most significant role in the decision making process and work autonomously. Only resolutions that have legal consequences require the National Wine Committee's approval. Because it is vital for each region to exploit

its potential, all competent members of the wine branch have the duty to assist their respective regional committee.

Establishment of Regional Wine Committees

The regulations for the establishment of Regional Wine Committees are anchored a decree from the Federal Minister for Agriculture, Forestry, Environment, and Water Supply on the March 30th, 2001. Presently, the following regional wine committees have been designated:

A Regional Wine Committee shall undertake the following specific tasks:

1. Enhance awareness and transparency as regards the production and marketing of *Qualitätswein* with the aim of achieving a better co-ordination of sales.
2. Conduct market research and implement marketing measures in co-operation with the Austrian Wine Marketing Board. These marketing measures must be in keeping with the image of Austrian wines as a whole.
3. Develop procedures and technologies aimed at improving product quality.
4. Draw up standard agreements, such as supply contracts and cultivation agreements.
5. Define the conditions for the production and marketing of regionally typical *Qualitätswein* with a distinctive profile of origin.

The Committees are designated "Regional Wine Committees" combined with the name of their local area of jurisdiction. The goal is to set up one Wine Committee per wine-growing region. This principle may be departed from in justified cases.

The Regional Wine Committees are composed of local representatives of the wine industry in each area. Examples of representatives of the wine industry are:

- Grape growers
- Wine producers
- Wine merchants
- Representatives of co-operatives
- Producers of sparkling wines

- Brokers etc.

The composition of the Regional Wine Committees must at any rate reflect the specific features of their particular area. This means that the number of members comprising local representatives of the wine industry will be weighted according to the amount of wine actually marketed. At the same time, the number of grape growers, wine producers, members of co-operatives, wine merchants etc. must also be taken into account. However, provided that the market participants agree, the above-mentioned weighting may take into consideration not only the current position, but also the possible future situation (i.e. the target) of the market.

A Regional Wine Committee shall consist of at least five members.
The number of members may not exceed the following limits:

In a wine-growing region.

- | | |
|--|------------|
| 1. with less than 1.000 ha of vineyards: | 7 members |
| 2. with between 1.000 and 5.000 ha of vineyards: | 15 members |
| 3. with more than 5.000 ha of vineyards: | 21 members |

The members of the Regional Wine Committees are recommended by the Presidential Conference of the Austrian Agricultural Chamber and the Austrian Chamber of Commerce through their respective local and regional organisations and are then appointed by the Federal Minister for Agriculture and Forestry, the Environment and Water Management for a period of five years. This recommendation requires the approval of the National Wine Committee.

Presently, the following regional wine committees have been designated:
(in parenthesis are the dates of decision notification of the National Committee resolution)

- | | | |
|-----|----------------|--------------|
| 1. | Carnuntum | (5.9.2001) |
| 2. | Thermenregion | (5.9.2001) |
| 3. | Traisental | (5.9.2001) |
| 4. | Wachau | (5.9.2001) |
| 5. | Burgenland | (28.11.2001) |
| 6. | Weinviertel | (28.11.2001) |
| 7. | Kremstal | (18.3.2002) |
| 8. | Wien | (12.6.2002) |
| 9. | Kamptal | (12.11.2003) |
| 10. | Wagram | (23.4.2003) |
| 11. | Klosterneuburg | (23.4.2003) |

2.9 The Value of Origin

An important goal will be to emphasise the unmistakable quality of Austrian wines, i.e. the creation of a unique identity, independent of price. In the long term, only clearly positioned products (in all price categories) will be able to maintain their edge on both national and international markets in the wake of increasingly fierce competition.

This goal can be achieved only if the consumer is given clear messages and information via the product itself. The best wine in the world is of no value if a potential buyer cannot recognise it clearly and distinctly.

The diversity of Austria's wine landscape, which is characterised by small wine-growing regions, a wide variety of grapes (some of which are hardly known internationally), a large number of quality grades and, above all, a broad range of different types of wine in one and the same region, makes Austrian wines difficult to export on the one hand and, on the other, does not provide much guidance for domestic consumers who do not profess to be wine experts.

Traditionally, Austria's wine industry has always been oriented to origin. It was only in the 1950s that, based on the German model, wines in this country became classified according to grape varieties and quality grades, which in turn were determined by the must sugar content. Based on these considerations, some six years ago the Austrian Wine Marketing Board embarked on discussions aimed at placing a stronger emphasis on origin in Austrian wine legislation. The core of this strategy, in line with the appellation policy that has been used by southern wine-producing countries since time immemorial, is to limit the designation of origin from a wine-growing area to just a few characteristic wine types, while all other varieties or quality grades are sold under the label of the new provincial wine-growing regions such as Niederösterreich und Burgenland (Lower Austria and Burgenland).

In other words: given the structural weaknesses and concomitant price fluctuations prevailing in Austria's wine industry, the range of products should be better segmented. Independent of the names of prominent wine estates, wines with a prominent designation of origin can thus maintain their price levels even when harvests are large.

The specific work undertaken by the Regional Wine Committees should not only ensure that these goals are achieved, but should also serve to strengthen the foundations of the Austrian wine industry in the long term. Based on the market data received, the Wine Committees ascertain how much wine is actually sold under the respective label of origin. For future harvests, the relevant Wine Committee could regulate the amount of regional quality wines offered by introducing additional quality standards to supplement the legal provisions (e.g. selling regional quality wines with inspection numbers by the barrel or by not selling grapes for regional quality wines without first concluding a specific vineyard agreement with the buyer). This should also ensure that wine sold by the barrel maintains reasonable prices. Price fluctuations would then be possible only in the case of *Tafelwein*, *Landwein* and *Qualitätswein-Bundesland*, which would absorb any "surplus".

2.10 DAC: The logical key to Austrian wine

The first geographically indicated wine (DAC) comes from the Weinviertel area

Geography rather than grape variety is given more profile in the Austrian wine hierarchy with the introduction of the new geographic indication system (DAC stands for „Districtus Austriae Controllatus). Austria's largest demarcated wine growing area, Weinviertel, is the first to label under the new system. "Weinviertel DAC" represents a Grüner Veltliner of typical regional character with a clearly defined taste profile.

Wines with geographic indications coupled with clearly defined taste profiles are introduced for the first time in Austria by the new DAC system. This new system promises future consumers exacter information with the goal of making purchasing decisions easier. In the short term not only consumers, but also merchants and the hospitality trade in the domestic and foreign markets will profit from easily recognizable and identifiable, regionally typical, taste profiles.

Strategic Improvement for Export

The new DAC system brings not only advantages on the domestic market, but also in export. Up until recently Austrian wine exports have not only suffered from the diversity in varieties, regions, and single vineyards, but also because of the extremely small-fractured production structure. Only few wineries are in the position to deliver a continuous supply of wines to international markets because quantities produced are simply too small. With the DAC model, it is now possible to characterize one regionally typical and defined wine style from several different producers. This advantage is expected to bring doubled export statistics for bottled wines.

Creation of a unique regional profile

Austria enters the established marketing system of the classic wine production countries represented by the DOC of Italy, the AOC of France, and the DO of Spain, where regional names become a brand (i.e. Chianti, Rioja or Chablis) and the grape varieties become secondary. In this way specific regions succeed in creating unique and clearly defined, unique identities which are closely entwined with local culture and climate. Grape varieties have proved themselves to be exchangeable, while origin is not.

Weinviertel as role model

Austria's first DAC wine has been on the market for only a short period. More than 500 vintners from Austria's largest wine growing area located adjacent to Vienna produce wines with the geographic indication "Weinviertel DAC". All of these wines are produced from the autochthon grape variety Grüner Veltliner, which comprises approximately 50% of the total vineyard area of the Weinviertel wine area. These wines are defined by their spicy, peppery aroma with delicate fruit and pale yellow to greenish yellow colour. These wines must fulfil the federal regulations for quality wines and are further subjected to strict sensory control. In this way a high level of quality can be attained and that the wines fulfil expectations for regional and varietal character guaranteed.

Regional committees define DAC character

In order to plan the DAC system, regional wine committees were formed with representatives from both wine merchandising and production sectors. These interprofessional committees were given the responsibility of creating marketing and production strategies with one of the main tasks being the clear definition of a regional image and a geographic indication that can then be marketed under the name of a demarcated wine growing area together with the DAC label. The goal of defining DACs is being discussed by all regional committees and the DAC system continues to be an evolutionary process. The next wine growing area that is likely to define a DAC is Burgenland. Whether this will be a large and diversified DAC with various sensory styles or one with various sub-districts each with its own distinct style is yet to be decided. In the second example, Burgenland could become a large geographic indication which is labelled on all quality wines from the region with sub-districts showing only on the labels of those wines with corresponding defined taste profiles. Dynamic discussions around this subject are underway in all of Austria's wine growing areas.

Logic has priority – a system for consumers

As is with all geographic indications, Austria's DAC is focused on regional origin with the goal of making purchasing decisions for consumers easier in a logical and simple way. In the long term, consumers should be able to associate a **clearly defined taste profile** with a geographic name. Because the association will be made with place of origin rather than with DAC, a hierarchy that would include a DACE or DACG would not be logical and is not planned. This type of system has proven to be confusing for consumers making purchasing decisions more complicated. The goal is to encourage consumers to buy wines from specific geographic origins that can be associated with a clearly defined taste profile rather than because of the DAC abbreviation on a quality seal.

This is to be interpreted differently with **price segmenting**. The introduction of supplementary terms for higher quality wines, for example with the word "Reserve", is meaningful. This type of supplementary labelling is easily understood by the consumer and communicates a wine of higher quality and value clearly. The best way to further communicate this system is to refrain from the use of **village or single vineyard names** on the labels of simple quality wines, reserving this privilege only for wines of higher value. In this way the use of further terms, such as "Klassik" or "Selektion", which can lead to consumer confusion, can be spared. The prerequisite for this policy is a familiar geographic indication with a clearly defined taste profile.

The message remains simple: the smaller or more specific the geographic origin is labelled, the higher the quality and value of the wine. In this way, Austria takes on a logical and internationally proven **basic principle of geographic origin marketing**. The message that the smaller or more specific the geographic origin is labelled, the better the quality and the more unique its regional character, is widely understood by consumers.

2.11 Questions and Answers – a Guide

1. What does DAC mean?

DAC is the abbreviation for Districtus Austria Controllatus, directly translated: Controlled District of Austria. As of March 2003, DAC may appear on Austrian wine label and denotes a typical quality wine of controlled geographic origin.

2. Why will there be DAC wines in the future?

The DAC concept was the logical conclusion to the quality improvements undertaken in the Austrian wine branch over the last decades. Austrian vintners and their wines achieved international recognition for their high level of quality. It is the intrinsic quality and authenticity of the product “Wine from Austria” that has made it competitive on an international scale. In view of the current market situation, it became clear that in order for a small-fractured wine economy (like Austria and Burgundy) to retain their market value and sustain themselves amongst competitive big brands, generic appellations would be necessary.

3. What is a DAC wine?

A DAC wine is essentially not a new wine at all. The DAC label is based on the same wine quality system as before and will basically denote wine that has a typical regional style and flavour profile. These wines will continue to be allowed to carry their wine area of origin on their labels. The DAC follows the lead of other renowned appellation systems of wine areas in Italy (Chianti and Soave for example), France (Bordeaux, Burgundy, and Chablis representative), or Spain (Rioja, etc). In these countries the appellation systems are abbreviated as DOC/DOCG, AOC/AC, or DOC/DO.

4. What does Weinviertel-DAC represent?

DAC wines will represent regionally typical wines from a demarcated wine area. The Regional Wine Committee of the Weinviertel wine area has chosen the Grüner Veltliner as their DAC wine. Not only because the variety Grüner Veltliner, which comprises 50% of the wine produced in the area, is an outstanding regional specialty, but also because of current demand. It can be stated without exaggeration that Grüner Veltliner has positioned itself on the international marketplace as the flagship varietal of Austrian wine.

The “Weinviertel-DAC” represents a Grüner Veltliner that is fruity, spicy, and peppery, has a pale yellow or green-yellow colour, shows no oak flavour or wood influence, and is dry. The alcohol content must be at least 12% and, like all quality wines from Austria, can be sold only in glass bottles (.75 l size or multiples of the 0.75 l size).

5. What is the difference between DAC wines and other wines?

The difference to other wines is simply that a DAC wine represents a quality wine that is typical for a demarcated area. In the case of the Weinviertel wine area, this is a Grüner Veltliner. Other high quality Austrian wines will, of course, continue to carry the “Qualitätswein” guarantee. The only difference in DAC wines to other quality wines will be that they represent and are marketed as typical wine specialties of a particular wine area.

6. Are DAC wines better than normal quality wines?

No, both wines are quality wines according to the established Austrian quality system. In addition to its proven quality, a DAC wine represents a typical wine specialty from a particular wine area with a specified style and flavour profile. A wine area will lend its name to DAC wines, for example “Weinviertel- DAC”, with the name of a specified geographic area representing a particular type of wine.

It is not the purpose of the DAC concept to create a new quality category, but rather to support the present quality categories with a marketing concept to enhance international success. The quality initiatives of the Austrian branch in the last decades have positioned Austrian wine among the international elite. It is now of key importance to strategically market this high quality. It is particularly necessary for small-structured wine economies like Austria to adapt their marketing structures to international demands with generic appellations according to successful international role model. This is the aim of the DAC concept.

7. What is the goal of the DAC concept?

The DAC concept is focused on national and international consumers. A solution for the easy recognition of a particular wine with a clearly defined style and flavour profile is offered. National and international consumers know how Chianti, Rioja, Chablis or Sauternes taste and what they can expect from a wine from these wine areas. These geographic areas have established themselves as clearly identifiable “brands” in the eyes of consumers. This is exactly the goal of the DAC concept. DAC should assist consumers in their wine purchase by giving a clearly defined message of a typical regional wine with a specific style and flavour profile as well as consistent high quality.

Only in this context will it be possible for the Austrian wine branch to position itself successfully long-term on the international marketplace. Developments in the international wine market (lead by California, Chile, and Australia) over the last 15 years have resulted in increasing economic pressure and disadvantages for small-fractured wine regions. Wine regions with no clear marketing concept or no recognizable brand identity will be destined a minor roll on the future wine market.

From the viewpoint of the Regional Wine Committees and the Austrian Wine Marketing Board, the efficient implementation of the DAC concept is a logical and necessary step.

8. What is a Regional Wine Committee?

The fundamental concept of a Regional Wine Committees is the idea that vintners and wine merchants know what is necessary and best for the wines of their region. An interprofessional committee made up of branch professionals has intimate knowledge of the various advantages and disadvantages of the local wine branch and is capable of considering all aspects, from production to international and national marketing, in order to develop and implement promising solutions.

Meanwhile nearly every Austrian wine area has its own Regional Wine Committee. Representatives from both production and trade are all integrated to guarantee that all aspects of the modern wine economy are considered. It is the responsibility of each Regional Wine Committee to govern and influence positively the production and marketing of the wine in “their” wine area. This, of course, includes the development of clearly defined regional wine profiles. The regional wine committees work together closely with the Austrian Wine Marketing Board for the development of marketing strategies.

9. Will every regional Committee create a DAC wine?

Yes, this is the current plan. Just as the Regional Wine Committee Weinviertel created the Weinviertel- DAC to represent their Grüner Veltliner, other Regional Wine Committees will also choose typical regional wines as their DAC wines. One DAC wine per wine area would be ideal from a strategic marketing viewpoint.

10. Doesn't the DAC concept simply copy old longstanding ideas? Shouldn't unique Austrian concepts be developed?

It is correct that the appellation system is an old longstanding concept. This is simultaneously proof that this is a functioning model demanded and developed by the wine branch itself. The DAC concept is an Austrian interpretation of the appellation system that weaves the uniqueness of Austrian wine into the positive aspects of an appellation system.

11. When will the first DAC wines be available?

Austria's first DAC wine is the "Weinviertel-DAC". This wine has been available since March 1st, 2003. March 1st will remain the release date each year for the next vintages. The other regional wine committees will follow successively with their DAC wines beginning 2004.

12. The last years have been very successful for the Austrian wine economy, especially in the export sector. What is the purpose of risking such an advantageous position with changes brought by the new DAC concept?

It is exactly because the national wine economy is so successful and Austrian wine has reached such a high international standard that this is the perfect time for offensive marketing strategies for securing continued middle and long term success with the current level of quality and quantity. The national wine branch and Austrian wine have achieved an excellent international reputation in the past years. The Austrian Wine Marketing Board sees this as the perfect time to use a most advantageous position.

13. What will happen if the DAC concept does not work as planned?

Without wanting to appear arrogant, the Austrian wine branch and the Austrian Wine Marketing Board views the DAC system as a certain success. Because the DAC concept is conceived for middle to long-term advantages, the effectiveness should be noticeable within the next one to three years. The success of the concept is guaranteed because the already high quality of Austrian wine will be further improved and the national and international marketing will make it possible for Austrian "brand" wines to compete with already established international peers.

14. What quantities are currently affected by the DAC concept?

The DAC system is to be understood as a mid to long term concept for the Austrian wine branch. Because of the year's low yield, estimates for the 2005 vintage are 2.5 to 3 million bottles of DAC wine. The export potential of DAC wines has been given a special focus. A massive increase in export of bottled wines can be expected long term up to 2010 according to current market analysis.

15. How will DAC wines be controlled in the future? Will this be different than controls for other quality wines?

The fundamentals of control for quality wines and DAC wines are identical. The DAC wines are quality wines and must fulfil the same standards. All quality wines must pass controls and professional tastings. Only once these multiple criteria have been successfully met does wine receive its seal of quality and quality control number. The process is the same for DAC wines with an additional tasting to secure that the wine meets the style and flavour profile and other criteria set by the Regional Wine Committee. Should the wine fail to fulfil all criteria for a typical regional DAC wine, it has already passed qualification as a quality wine and will remain as such. The qualification as a DAC wine, like that for a quality wine, must be passed for each new vintage.

16. How will the price for DAC wine be structured?

The price for a 0.75 l bottle of Grüner Veltliner quality wine from the Weinviertel wine area currently starts at 2 Euros. Because of its high quality standard the price for a bottle of DAC-Weinviertel wine will begin at 5 Euros in the future.

17. What will vintners that produce no DAC wine do in the future?

Nothing will change for these vintners. The quality categories of the past remain unchanged and intact and will continue to be marketed in the future. It is only the seal of geographical origin that may change, but according to marketing and communication experts this should have no impact on consumer acceptance.

3 The Austrian Market

3.1 Domestic Wine and Sparkling Wine Consumption

3.1.1 Domestic Wine Consumption

Consumption from 1980/81 to 2003/04 (in hl)

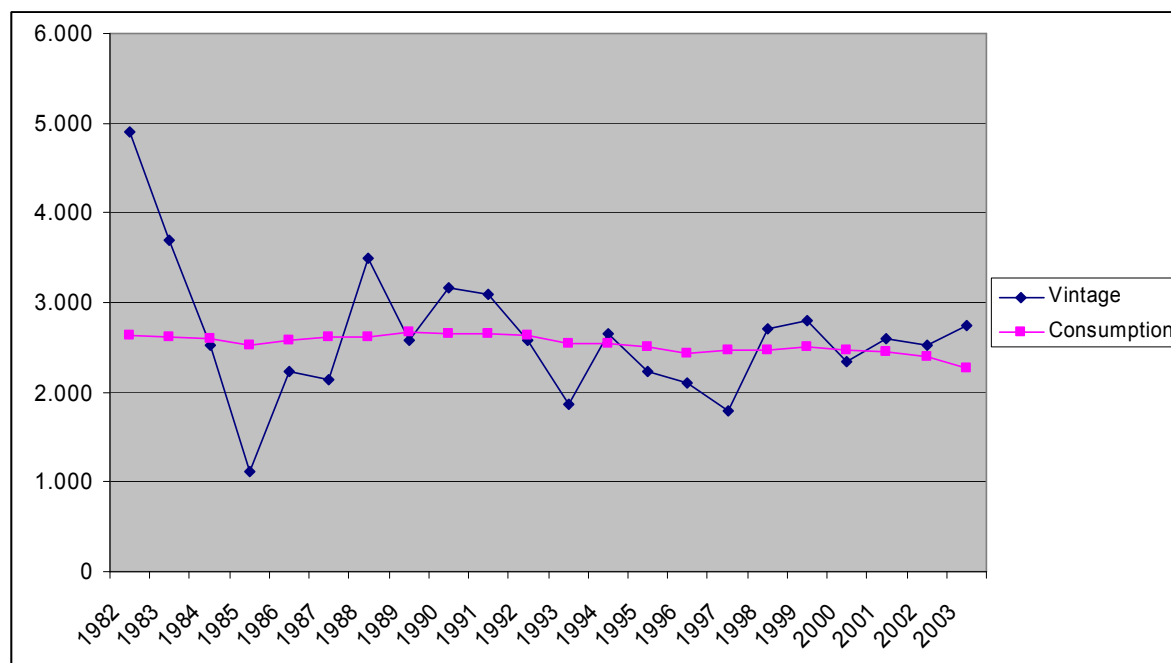
Year	Consumption in hl	Year	Consumption in hl	Year	Consumption in hl
80/81	2,617,906	88/89	2,621,115	96/97	2,425,859
81/82	2,594,786	89/90	2,669,761	97/98	2,460,764
82/83	2,626,493	90/91	2,654,359	98/99	2,478,349
83/84	2,622,734	91/92	2,645,399	99/00	2,505,291
84/85	2,596,756	92/93	2,642,435	00/01	2,476,616
85/86	2,529,356	93/94	2,542,447	01/02	2,290,740*
86/87	2,584,623	94/95	2,536,706	02/03	2,402,987
87/88	2,612,580	95/96	2,496,582	03/04	2.262.683

Until 1993/94: Nov 1 - Oct 31; as of 1994/95: Sep 1 - Aug 31; as of 2000/01: Aug 1 - Jul 31

Source: Statistics Austria; "Balance of Supply"

* corrected data

The decline in wine consumption continued in the fiscal year 2003/2004. Slightly less than 2.3 million hectoliters of wine are currently consumed in Austria yearly. The consumer trend towards quality and health consciousness is believed to be a primary factor of influence.



3.1.2 Domestic Consumption of Sparkling Wine 1990 - 2003

Year	Consumption in litres	Consumption in 0.75 l bottles
2004	137402,770	17,870,360
2003	13,055,554	17,407,405
2002	14,305,556	19,074,074
2001	14,920,563	19,894,084
2000	14,625,000	19,500,000
1999	18,545,000	24,726,667
1998	15,280,000	20,373,334
1997	16,525,000	22,033,333
1996	16,100,000	21,466,666
1995	14,405,556	19,207,406
1994	11,186,111	14,914,816
1993	13,674,998	18,233,333
1992	11,041,669	14,722,223
1991	18,629,170	24,838,890
1990	14,045,834	18,727,778

Source: Association of the Austrian Sparkling Wine Industry, 2005

The consumption of sparkling wines was in a steady decline from the year 1999, but seems to be stabilizing in 2004. With 13.4 million liters (17.87 million 0.75 l bottles), consumption was slightly above the previous year. The abolition of luxury taxes on sparkling wines in April 2005 is the probable cause for the positive development on the domestic market. Prosecco poses a continued challenge for Austrian sparkling wines on the domestic market.

3.1.3 Per-capita Alcohol Consumption

Year	Spirits (litres of pure alcohol)	Beer (litres) *	Wine (litres) **
61	2.15	77.3	20.8
62	2.30	80.2	22.1
63	ca. 2.3	85.2	22.5
64	2.00	89.9	26.0
65	2.20	92.1	29.8
66	1.90	98.8	31.6
67	1.84	102.6	31.9
68	1.96	98.2	33.4
69	1.20	99.0	33.5
70	1.40	98.7	34.6
71	2.28	101.8	35.9
72	2.36	103.7	35.5
73	ca. 2.3	110.1	36.8
74	1.96	105.4	35.4
75	1.65	103.8	35.1
76	1.70	102.0	36.3
77	1.70	103.1	36.1
78	1.37	100.9	35.0
79	1.56	103.9	35.8
80	1.59	101.9	35.8
81	1.51	104.8	35.1
82	1.52	108.5	35.3
83	1.55	109.4	37.4

Year	Spirits (litres of pure alcohol)	Beer (litres) *	Wine (litres) **
85	1.46	111.6	34.3
86	ca. 1.45	118.5	32.8
87	ca. 1.45	118.3	33.9
88	ca. 1.45	117.8	34.2
89	ca. 1.45	1.3	35.2
90	1.51	121.3	35.0
91	1.74	123.9	33.7
92	1.26	122.2	33.1
93	1.5	116.7	34.3
94	1.4	116.6	32.8
95	1.	115.6	32.0
96	1.5	114.0	31.5
97	1.5	113.3	30.0
98	1.4 ***	108.1	30.9
99	1.4 ***	108.9	30.6
2000	1.4 ***	107.7	30.5
2001	1.4 ***	107.4	28.5 ***
2002	1.4 ***	108.5****	29.8 ***
2003	1,4****	110.6	29.8****

* Figures include light and alcohol-free beer

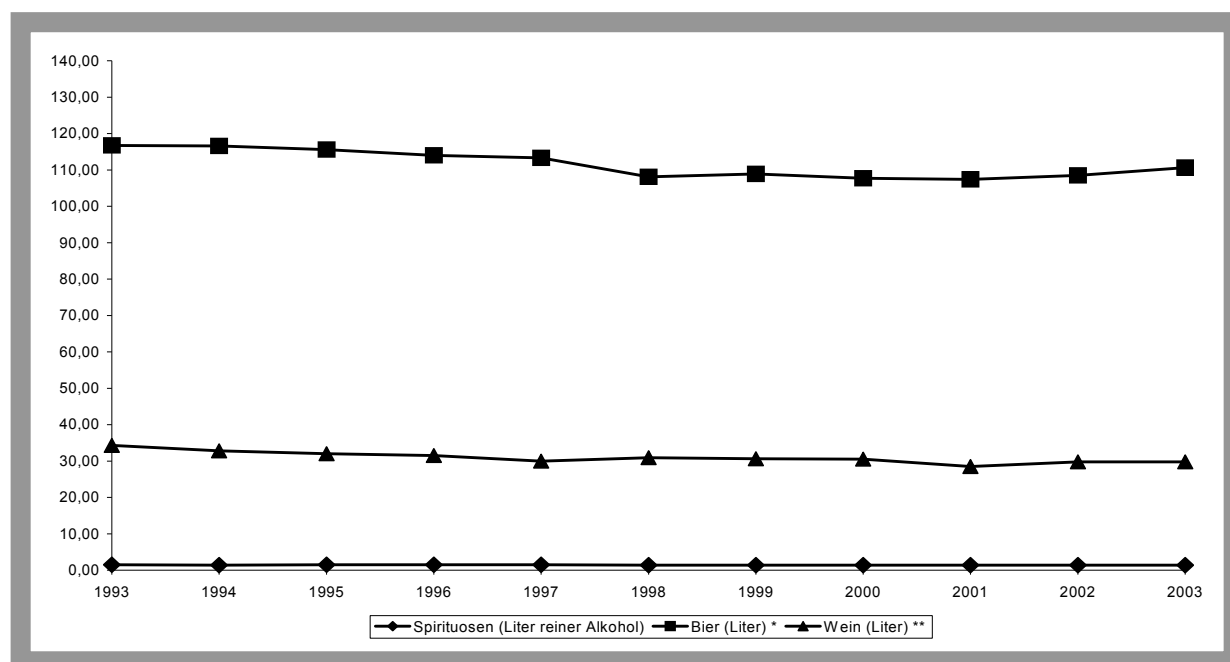
** From 1 July to 30 June

*** Estimated figure

**** no current data available

Source: World Drink Trends 2005

Beer, wine, and spirit consumption in Austria 19923-2003 in liters per capita annually

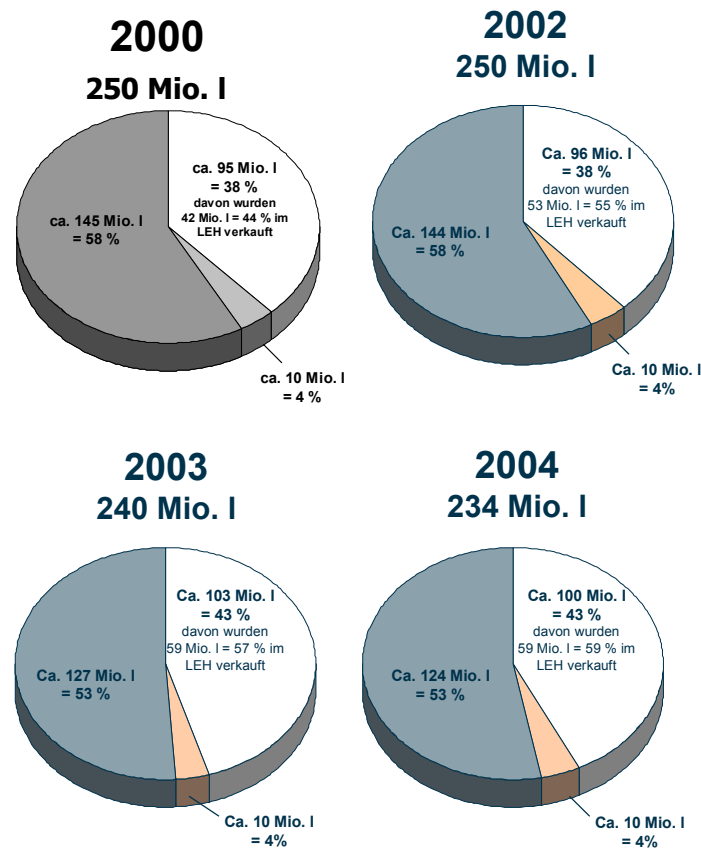


Sources: World Drink Trends 2005

3.2 Market Segments

Sale/Consumption in Austria

Total volumes of foreign and domestic wines



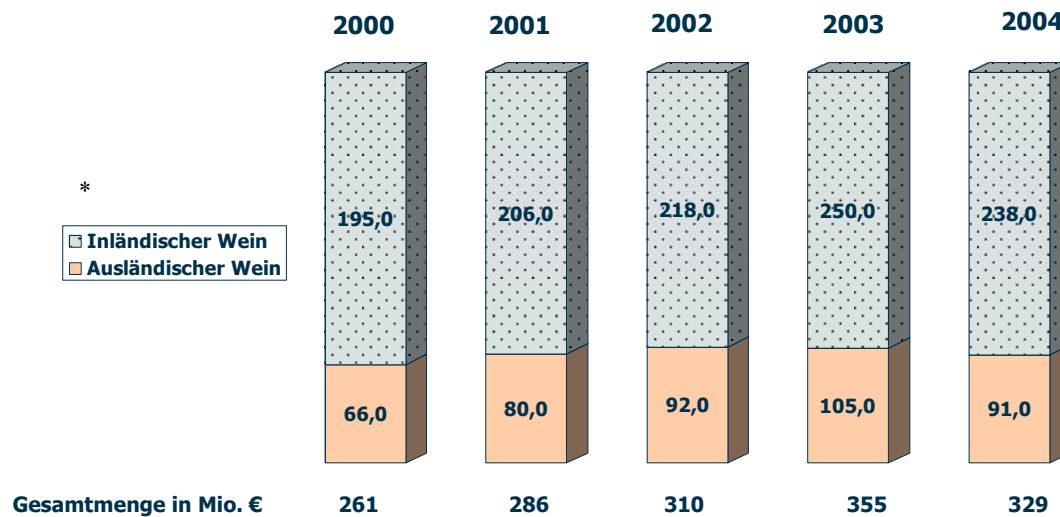
The share of the various retail and wholesale sectors based on data from the years 2000 to 2004 have been analysed by the GfK. The on-trade wine consumption has decreased slightly and while the household consumption saw a light increase to 100 million litres. This means that 43% of wine consumed in Austria is enjoyed at home. The total consumption saw a slight decrease to 234 million litres.

3.3 The home consumption of wine in Austria – GfK Household Panel

The Fessel-GfK data show current statistics for the Austrian wine consume in private homes. Important trends can be interpreted from this data:

Wine 2000-2004

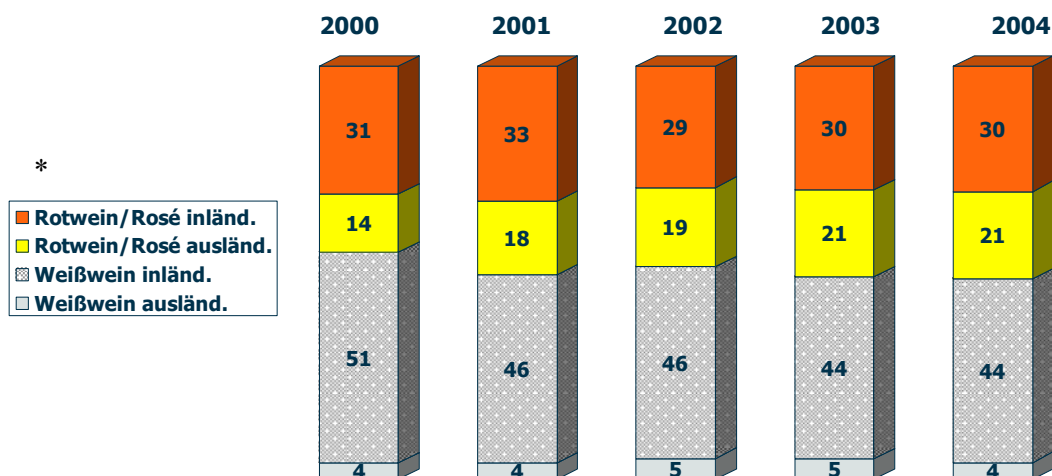
purchased volume in million litres – private household market



*
foreign wine: volume in mio litres
domestic wine: volume in mio. litres

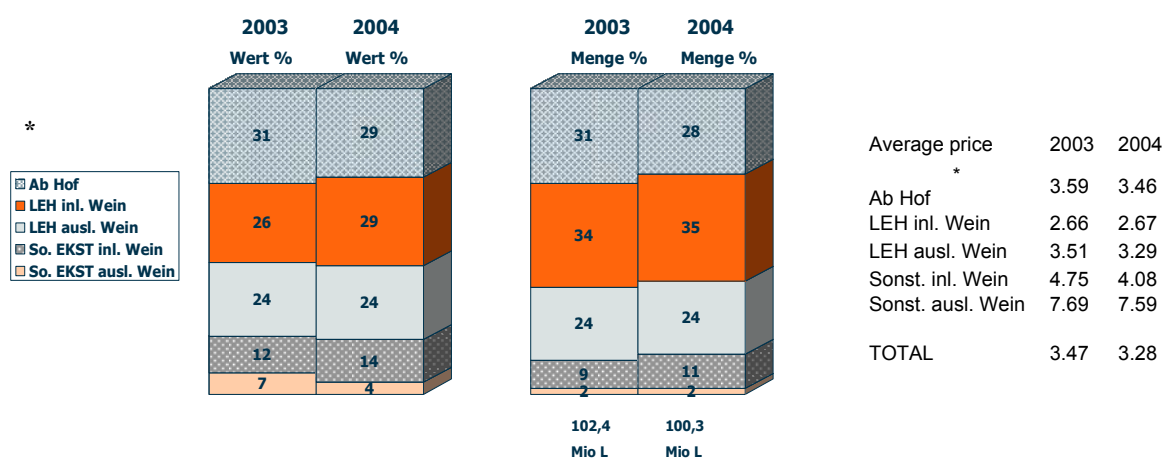
Wine 2000-2003

sales of red and white wine – volume percentages



*
1. domestic red and rosé wine
2. foreign red and rosé wine
3. domestic white wine
4. foreign white wine

Wine 2002-2003 - value and volume shares of retailers – household market average price per litre

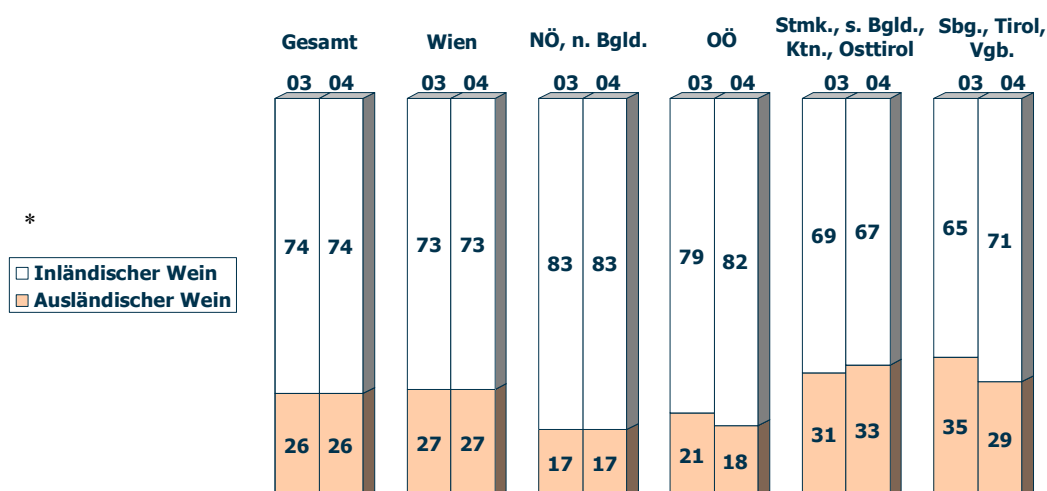


✖

1. sales on winery premises
2. grocery retail sales domestic wine
3. grocery retail sales foreign wine
4. other retail sales domestic wine
5. other retail sales foreign wine

Wine 2002-2003

Volume shares for domestic and foreign wine by federal state



*

1. domestic wine
2. foreign wine

**

NÖ = Niederösterreich (Lower Austria)
 n.Bgld = northern part of Burgenland
 OÖ = Oberösterreich (Upper Austria)
 Stmk = Steiermark (Styria)
 s.Bgld = southern part of Burgenland

Ktn = Kärnten (Carinthia)
 Ostir = Osttirol
 Sbg = Salzburg
 Tir = Tirol (Tyrol)
 Vbg = Vorarlberg

3.4 Austrian Wine Sales in the Grocery Retail Trade (Nielsen – Trade Panel)

AC Nielsen led the trade panel surveys for the grocery retail trade in Austria and was contracted by Austrian Wine Marketing Board for a wine-specific survey. Various trade organizations with scanning registers were involved in gathering statistics. These trade organizations included: the REWE Group, the Spar Group, Zielpunkt, ZEV-Markant, and ADEG. The market panel was able to cover approximately 94% of the supermarket sales. Not included are the independent grocers Hofer and Lidl

The charts show information for the following themes:

- sale volume and value
- shares by color and container
- shares by country of origin (volume and value)

The enormous increase in volume sold over the last years can be seen to draw to an end in 2003 and in 2004 a slowing of volume growth in Austrian grocery retail can be observed for the first time. Austrian grocery retail sold 44.86 million liters of wine in 2004 and the comparison of the first 2 quarter yearly figures for 2004 and 2005 signal no further massive volume growth. Although the first quarter of 2005 displays slightly less value than the previous year, this value is believed to reflect the extreme current price competition. Comparison of the various trade organizations show volume increases for REWE and Spar in 2004 and in the first half of 2005.

The trend for packaging preference in 0.75 l bottles continues with both volume and value of sales in Austria. The value share of wine sold in 0.75l bottles comprises 80% of total sales.

While sales of white wine displayed a general decline in the past years, this stabilized in 2004 and the first two quarters of 2005 show a significant increase both in volume and value. This trend can be observed not only in Austria, but internationally.

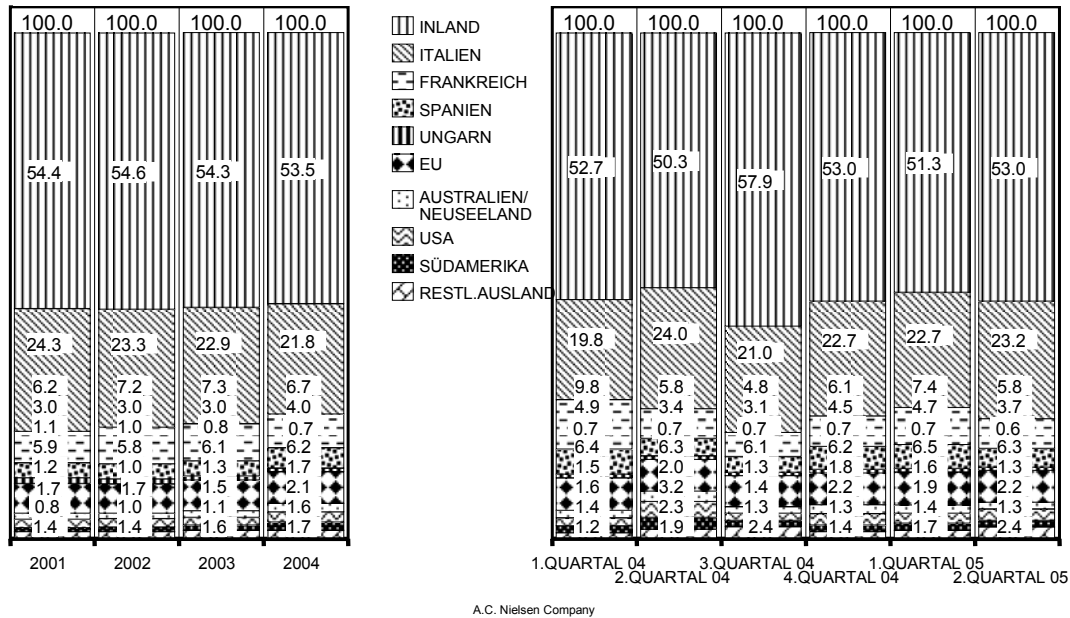
Analysis of the market shares according to country of origin reveals Austrian wine in a strong position. With 53.5% by volume and gaining in the first 2 quarters combined with a stabile share of value (particularly the strong 2nd Quarter of 2005), future estimates continue to be promising.

Austria continues to hold the leading position with white wines at 71.5% of volume and 76% of value. This means that 3 from 4 bottles of white wine sold domestically are Austrian. Potential remains to be exploited in the red wine sector which show a slightly declining volume at 38.9% and value at 35.1%, although the first quarters of 2005 signify a slight gain for Austrian red wines. The most important segment appears to remain quality wine in 0.75 l bottles and despite an observed stagnation in volume over the previous years (slight increase in the first quarters of 2005), there is a comparative increase in value. In the current analysis Austrian wine claims 44.8% of the domestic market. The divisions of red and white wine market shares are respective to the total.

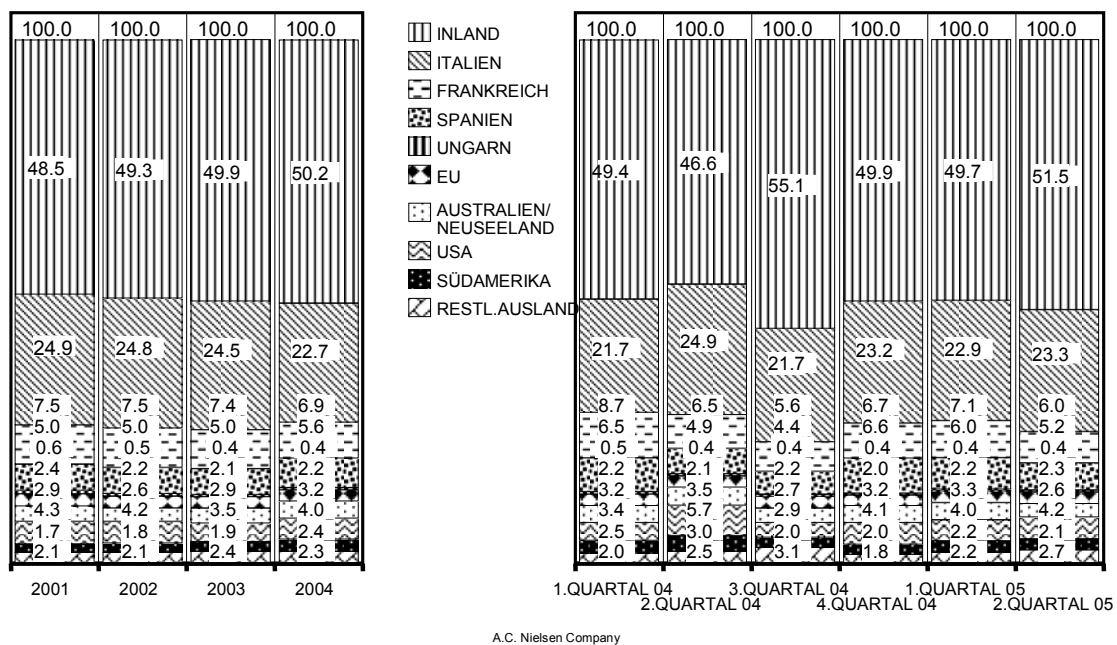
Comments for diverse price categories can be found with the related Charts in the following pages.

The price category analysis displays an inclining curve in the entry level up to € 1.49. The influence of aggressive sales at dumping prices for foreign wines in the supermarkets is not to be underestimated, particularly in the first 2 quarters of 2005. Austrian wines have an enormous problem competing with wines in the lower price bracket from €1.5 to €2.49. While 31.6% of all wines sold in Austria are in this price category, only 22.7% of total Austrian wines compared to 38.7% of total foreign wines comprise this statistic, displaying potential in this segment for Austria. In the next price bracket from €2.50 to € 3.49, it was possible for Austria to secure a better position. This price segment comprised 31% of the total Austrian wines sold in comparison to 23% of foreign wines.

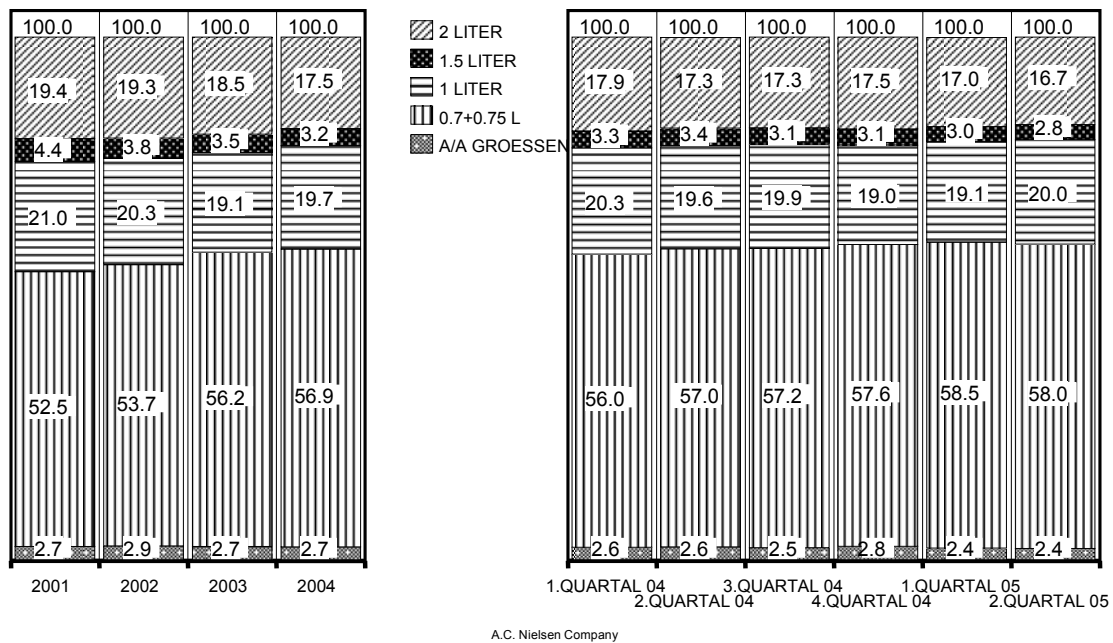
Volume share of wine by country of origin
grocery retail scan total



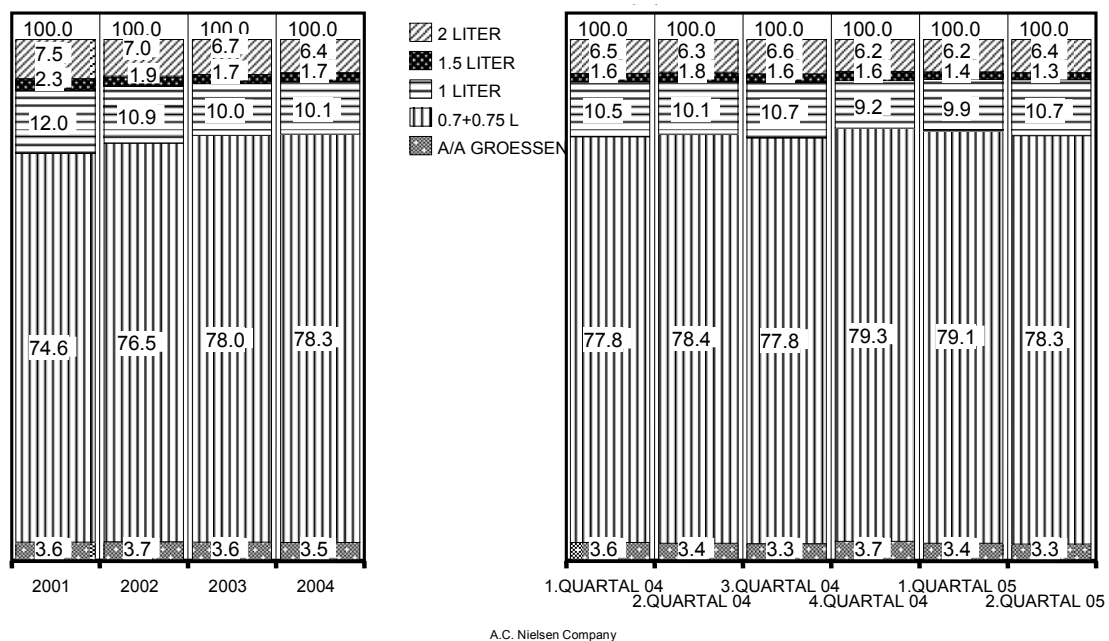
Volume share of wine by country of origin
grocery retail scan total



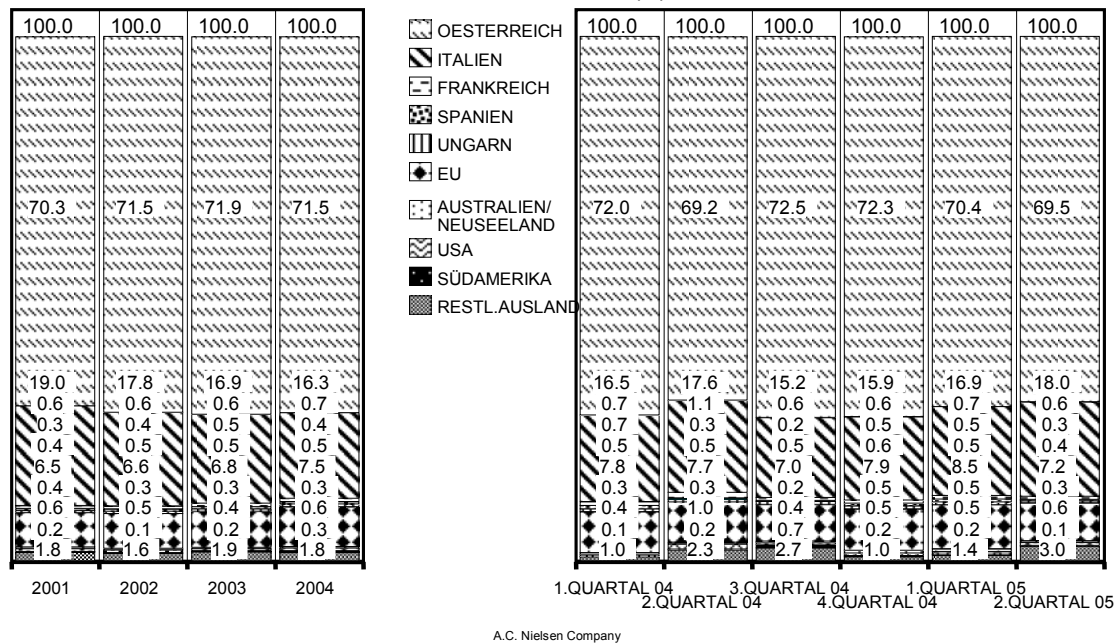
Volume share by container size
grocery retail scan total



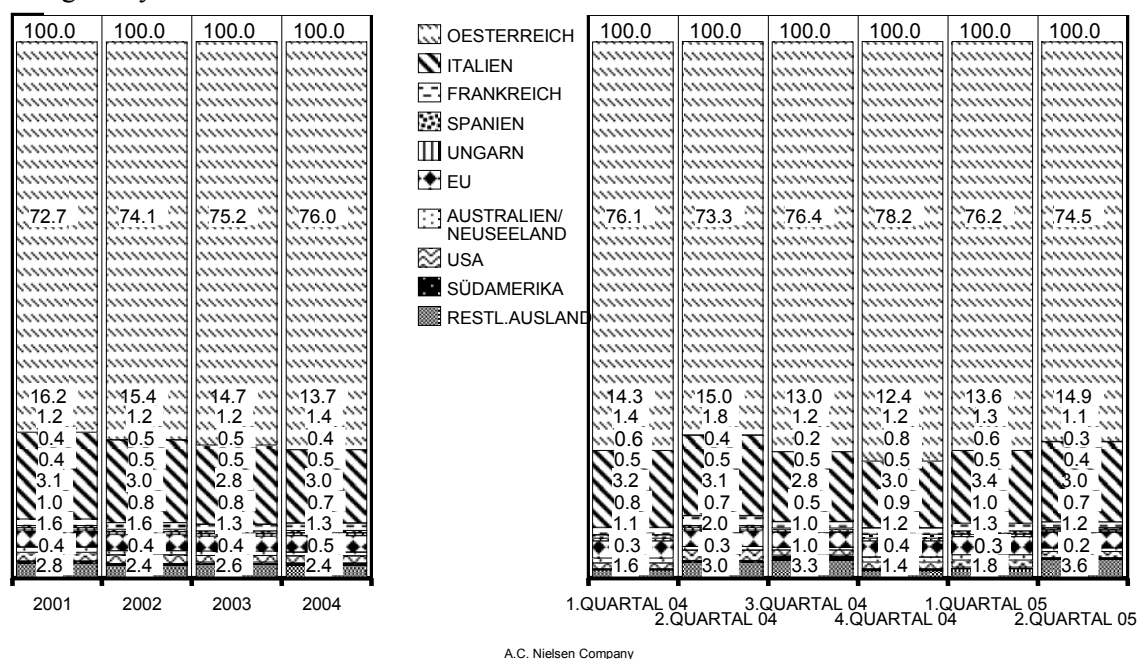
Value share by container size
grocery retail scan total



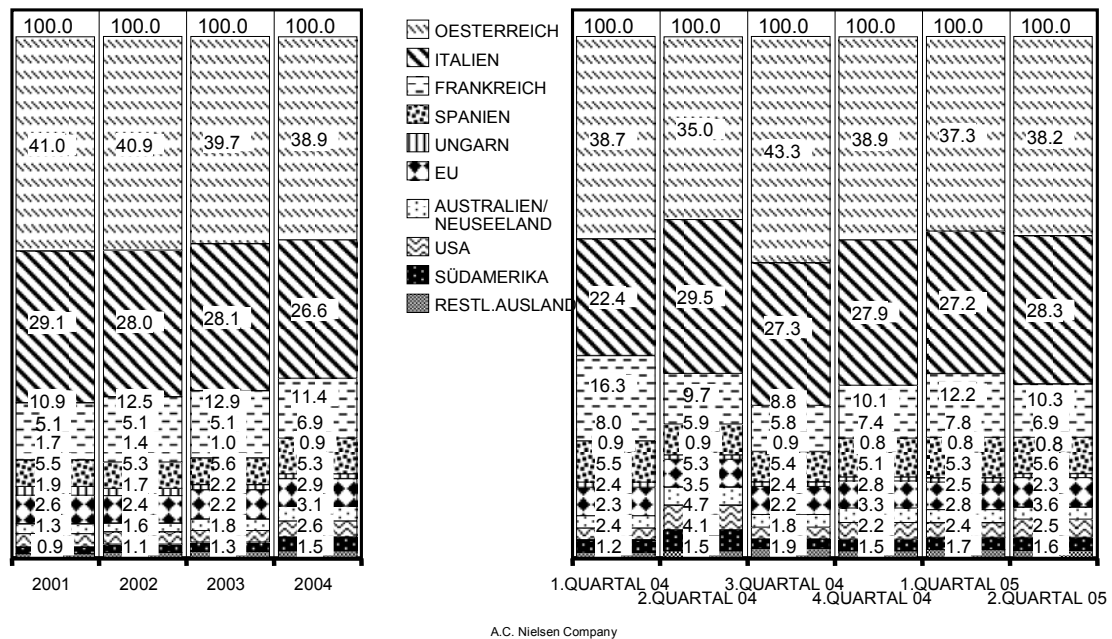
Volume share of white wine by country of origin grocery retail scan total



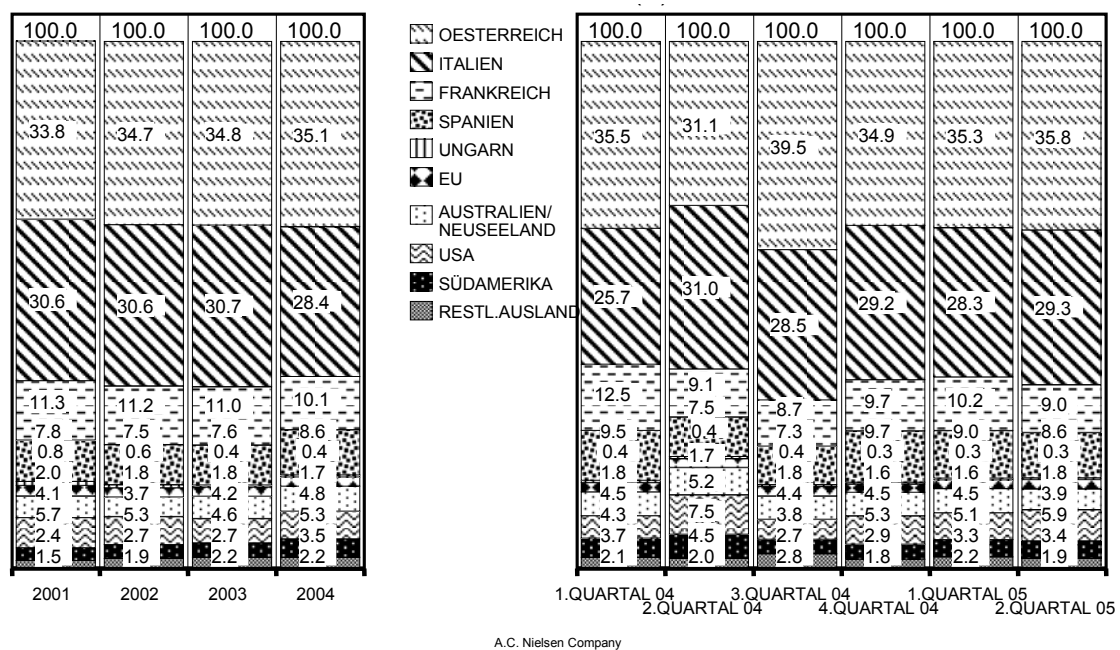
Value share of white wine by country of origin grocery retail scan total



Volume share of red wine by country of origin grocery retail scan total



Value share of red wine by country of origin grocery retail scan total



3.5 The Image of Austrian Wine in Comparison to Imported Wine (Nielsen Brand Tracking)

The opinions of Austrian consumers strongly favour Austrian wines to imported wines. The positive basic attitude favouring Austrian wine on the domestic market should serve as an important signal for the assortment selection of the wine branch and the Austrian supermarkets and help realize the high economic potential for Austrian wine.

The market position of Austrian, Italian, French, Spanish, Californian and South African wines along with other wines from overseas was researched by Nielsen.

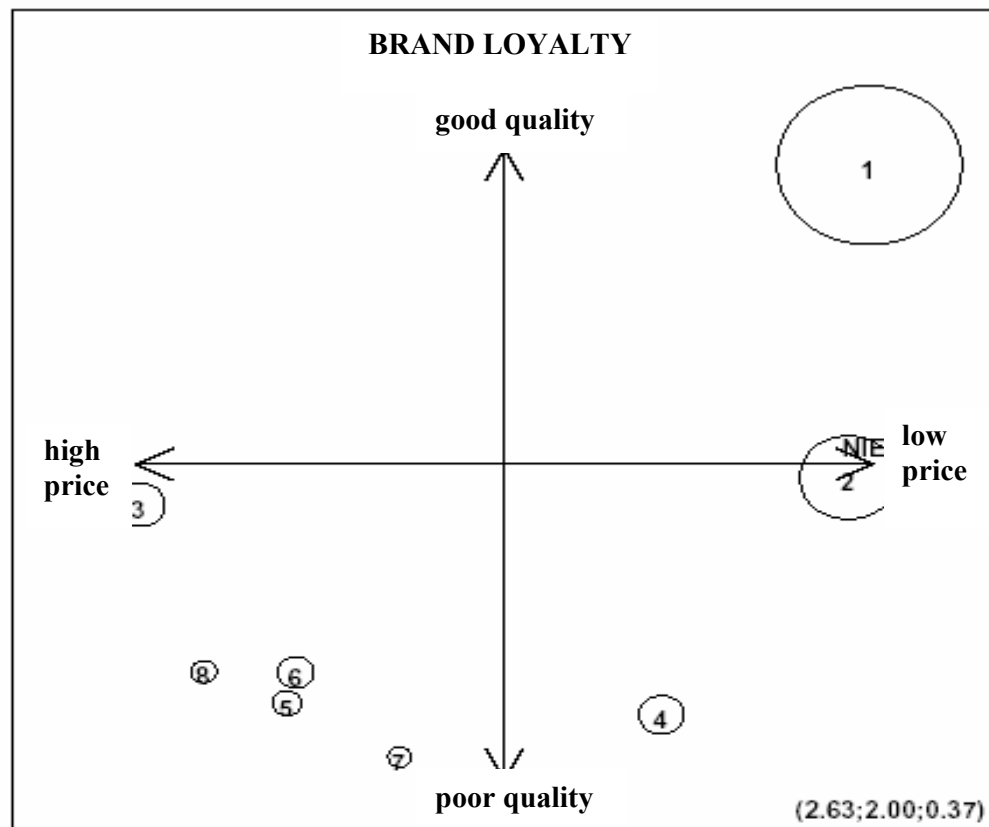
Nielsen Brand Tracking - Research Methods

Method of survey:	representative written questionnaire
Random sampling:	1,234 people across Austria, representative over 14 years old, varying addresses (no panel)
Method of selection:	random quota
Structural validation:	factor priority
Table base:	
Household use	1,234 people
Personal use:	1,234 people
Survey rhythm:	twice yearly
Survey dates:	April/May 2005

General Market Positioning

Brands were judged by price and quality and based on the number of people that knew a brand. The scores for price and quality were based on a five-point scale.

The following graphic shows the positioning of each brand; the circle circumference size represents the effective share of mark loyalty.



1. Austrian wine
2. Italian wine
3. French wine
4. Spanish wine
5. wines from Australia/New Zealand
6. wines from California
7. wines from South America

4 Austria's Foreign Trade in Wine

4.1 Volume and Value of Austrian Wine Exports

All of the EU related data from Statistics Austria is based exclusively on *Intrastat Reports*. European export countries are required to make an *Intrastat Report* to the EU first upon exceeding minimum gross sales (200,000 Euro minimum in Austria). These statistics do not include so-called car "boot" or "trunk" exports or small shipments and are therefore not exact. The minimum sales requirement for making an *Intrastat Report* varies from country to country.

Financial Year*	Import (hl)	Export (hl)
1985/86	274,321	45,223
1986/87	346,308	45,830
1987/88	367,010	35,179
1988/89	243,552	44,853
1989/90	244,191	104,115
1990/91	214,506	157,300
1991/92	199,196	223,599
1992/93	195,318	118,999
1992/94	185,819	128,694
1994/95	240,663	218,927
1995/96	282,552	173,950
1996/97	517,675	217,002
1997/98	664,124	208,101
1998/99	564,901	227,395
1999/2000	517,249	365,025
2000/2001	518,265	308,025
2001/2002	572,858	563,493
2002/2003	497,453	804,083
2003/2004	610,691	764,180

Until 1993/94: Nov 1 - Oct 31; as of 1994/95: Sep 1 - Aug 31

Source: Statistics Austria; "Balance of Supply" 2004

International wine import and export (bottled wine and cask wine) 1988/89 – 2003/2004



4.2 The 20 Major Export Countries for Austrian wine

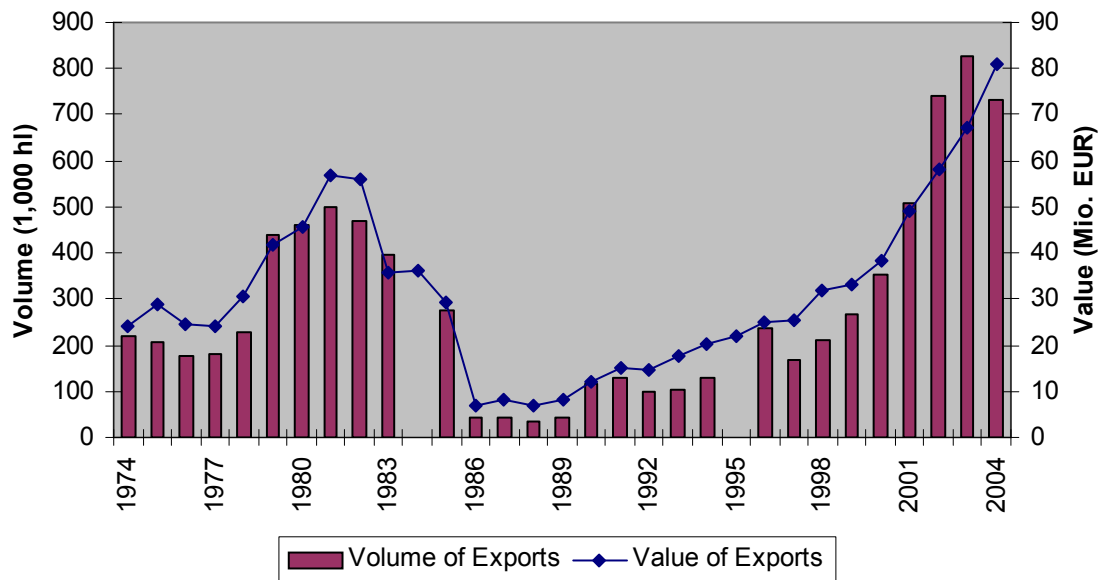
Country of Destination	in 1000 €											
	2004	Rank	2003	Rank	2002	Rank	2001	Rank	2000	Rank	1999	Rank
Germany	48.244	1	46.439	1	41.987	1	33.857	1	28.500	1	25.588	1
Czech Republic	8.522	2	5.909	2	3.740	2	3.683	3	1.010	5	1.822	3
Italy	6.130	3	1.566	5	1.761	5	571	8	448	9	1.355	5
Switzerland	5.220	4	4.310	3	3.553	4	2.758	4	2.702	2	1.681	4
United States	4.877	5	3.943	4	3.618	3	4.272	2	2.057	3	1.858	2
United Kingdom	1.317	6	553	9	313	10	598	7	354	11	268	13
Japan	1.185	7	669	6	627	7	632	6	525	7	764	6
Slovakia	802	8	417	14	176	16	1.058	5	506	8	138	17
Denemark	793	9	104	20	111	19	163	18	63	21	105	19
Poland	749	10	665	7	213	13	299	15	169	16	396	10
Netherlands	713	11	510	10	433	8	262	16	1.030	4	241	14
Liechtenstein	627	12	499	11	703	6	519	9	562	6	724	7
Norway	533	13	255	15	159	18	170	17	219	13	118	18
Hungary	489	14	595	8	102	21	12	37	17	36	90	21
France	455	15	212	16	185	15	333	13	142	17	89	22
Canada	413	16	458	12	252	11	392	12	219	14	432	9
Taiwan	324	17	182	18	170	17	396	11	264	12	312	11
Belgium	290	18	199	17	209	14	129	20	177	15	269	12
Sweden	251	19	426	13	366	9	406	10	394	10	716	8
Finland	170	20	128	19	221	12	159	19	51	23	86	23
Country of Destination	in Hektoliter											
	2004	Rank	2003	Rank	2002	Rank	2001	Rank	2000	Rank	1999	Rank
Germany	426.128	1	528.191	1	503.519	1	292.597	1	273.604	1	190.971	1
Czech Republic	216.942	2	193.889	2	152.682	2	154.789	2	40.409	2	55.144	2
Italy	21.878	3	27.713	3	50.742	3	1.743	7	1.432	9	1.190	10
Slovakia	19.887	4	18.999	4	11.987	4	45.774	3	17.798	3	3.103	5
Poland	16.680	5	12.278	6	2.996	8	2.601	6	1.422	10	4.474	3
Switzerland	8.790	6	10.614	7	5.576	5	4.257	4	4.296	5	2.867	6
United States	8.797	7	6.364	8	4.388	6	3.257	5	2.809	6	2.322	7
Hungary	6.348	8	18.058	5	3.228	7	31	34	32	32	785	15
Netherlands	1.921	9	1.276	11	1.176	10	639	16	7.133	4	535	17
Canada	1.528	10	2.237	10	494	17	642	15	519	14	2.001	8
Norway	1.481	11	902	14	234	21	185	21	365	17	175	24
Japan	1.401	12	1.079	13	1.028	11	1.038	9	942	11	1.716	9
Liechtenstein	1.265	13	680	17	1.273	9	740	12	1.635	7	1.085	11
United Kingdom	854	14	404	20	243	20	655	14	510	15	828	14
Belgium	829	15	698	16	760	14	257	20	716	13	919	13
France	583	16	572	19	505	16	673	13	151	21	182	23
Sweden	313	17	1.160	12	788	13	1.379	8	1.571	8	3.683	4
Slowenia	26	18	2.306	9	67	33	3	55	9	48	5	52
Lituania	20	19	744	15	973	12	9	40	445	16	222	20
Greece	13	20	593	18	628	15	2	57	0	73	49	35

*) ordered according to the documentation year 2004

Source: *Statistics Austria*

4.3 Austrian Wine Exports – Long-term Prognosis

Austria's wine exports 1971 – 2004
(excluding sparkling wine)



Source: Statistics Austria

Comment:

According to Statistic Austria the results for 1995 are not conclusive, therefore a graph for that year is waived. The statistics for 1996 are also not completely sound and the results, particularly concerning geographic origins, can be seen only as approximations.

5 The Austrian Wine Law

5.1 The Wine Law of 1999

The Wine Law of 1999 brought new regulation of the wine areas and wine regions: the larger wine-growing areas of Niederösterreich (Lower Austria) and Burgenland were added and the wine regions Weinland and Bergland were created. Adaptations of the regulations on fruit wine were made to reflect modern technologies while at the same time providing protection to fruit must produced in the traditional manner. Moreover, a large number of simplifications, clarifications and adaptations to EU Community law were provided for.

Since it was passed in 1985, the Wine Law has been amended several times. The deletion of old and the addition of new sections had made the external form of the law imprecise and difficult for the people who should be following it to interpret. The present amendment is the result of an official petition to rephrase the Wine Law. The text of this rewording is in accordance with the petition, but renumbering as well as a clear distinction between the regulations on wine made from grapes and wine made from fruit has been undertaken. The new Wine Law of 1999 is a response to a long-standing desire, especially on the part of the wine industry, to create a lucid wine law as an integrated whole. In addition, the new Wine Law represents an adaptation to EU Community law in both a physical and a terminological respect.

Simultaneous to this amendment, the Agrarian Market Austria (AMA) Law was also altered to permit the levying of marketing fees for wine shipped to destinations outside Austria in containers larger than 50 litres. Thus an independent motion in accordance with Section 27 of the Rules of Procedure was also introduced.

Two committee rulings were made. The first confirmed the customary definition of a *G'spritzter* as a drink containing at least 50% wine, no more than 50% soda water or mineral water, and at least 4.5% alcohol. The second ruling established that use of the name "*Obstmost traditionell bäuerlicher Produktion*" (traditional farm-made fruit must) will be restricted to farms.

The Most Important Points at a Glance:

- Creation of larger wine-growing areas (the wine-growing areas of Niederösterreich and Burgenland) while retaining the smaller ones. Creation of the wine-growing regions Weinland and Bergland.
- Revision of the chapter on fruit wine.
- In particular, authorisation of the use of "modern concentrate technology" and creation of an "*Obstmost traditionell bäuerlicher Produktion*" (traditional farm-made fruit wine). In addition, the outdated portions of the law on fruit wine are being adapted to the new requirements.
- Adaptation of the regulations on wine monitoring to the requirements of actual practice (especially the possibility of warnings issued by federal winery inspectors).

- Terminological corrections:
Concretisation of wine terminology in each individual passage of the text; deletion of all references to “versetzt” (fortified) and “nichtversetzt” (non-fortified) wine. Catalogue of regulated terms to supplement those already regulated under EU law; in addition, a comprehensive terminological adaptation to EU law.
- Adaptation to achieve conformity with the regulations of EU law in all areas (e.g. fortification, sweetening and designation) that already had de facto validity.
- Adaptation of the definition of marketing to the requirements of practice.
- Clarification e.g. in the case of pearl wine, alcohol-free or low-alcohol wine.
- Deletion of blended wine drinks (with wine content under 50%) from the scope of the Wine Law.
- Empowerment for the Federal Minister for Agriculture, Forestry, Environment and Water Supply to issue regulations to implement regulations of the European Community that are not immediately applicable concerning the marketing of products covered by the Wine Law (e.g. Community guidelines on food labelling and additives).
- Deletion of the requirement for harvest and stock declaration on April 30th. Levying of a marketing fee to include wine that is shipped to other countries in containers larger than 50 litres since this wine is bottled abroad and then sold by retailers as Austrian wine.

5.2 The 2000 Amendment to the Wine Law

The 2000 Amendment to the Wine Law consists essentially of the following points:

1. Changes with regard to contents:

- Changing the act of sweetening of *Prädikat* wines from an offence requiring court action to one requiring administrative action.
- Adaptation of the Wine Law of 1999 to the new common organisation of the market in wine (COMW).
- Inclusion of empowerment for the creation and regulation of industry associations (also made necessary by the new COMW).
- Deletion of all competencies of examination of the other federal ministers (except for those of the Minister of Finance) in issuing regulations.
- Deletion of the requirement for harvest and stock declaration as of 30 November.
- Adoption of a requirement that *Heuriger* (wine from the last vintage), *Schilcher* and *Bergwein* must be produced in Austria.

2. Changes with regard to wording:

- Replacement of the term *Inländischer Wein* (domestic wine) by *Österreichischer Wein* (Austrian wine).
- Deletion of the declaratory regulation on the composition of certain additives that are forbidden in wine production.
- Clarification that if a smaller geographic unit is specified, 100% of the grapes must not necessarily come from this unit but that the statutory exemption under Section 24 Z 2 may also apply.
- Adoption of permissibility of the specification of three grape varieties in the case of *Schaumwein* (sparkling wine) as already permitted under labelling regulations.
- Clarification of which regulations of the Wine Law actually apply to fruit wine.
- Replacement of the word *Frist* (fixed period of time) by *Stichtag* (fixed deadline date) in the penal regulation concerning harvest and stock declarations.
- Insertion of a subsidiary clause in the case of certain administrative offences as in Paragraph 1 and 2; "...if the offence is not punishable by a heavier penalty in accordance with other regulations".
- Adaptation of the nomenclature of the federal ministries to the 2000 Amendment to the Law on Federal Ministries.

5.3 The 2002 Amendment to the Wine Law

The most significant points of article 10 of the Agrarian Policy Reform 2002 (BGFB I Nr. 110) amending the Wine Law 1999 (BGBl I Nr. 141) are as follows:

Section 3, Paragraph 6:

In comparison to the previous formulation of Section 3, Paragraph 6 it is made clear that in all phases of wine production perfect hygiene must be maintained. The term wine production as defined in Section 2, Paragraph 1 is to be included here, in which all phases of production, from harvesting and vinification to transfer and storage to sale, are described.

A corresponding civil offence constituent was added to Section 66, Paragraph 1 in which the repeated disrespect for hygienic circumstances during the production of wine as described in Section 3, Paragraph 6 is punishable by law. Criminal charge is to be made through the Federal Wine Cellar Inspection at the district court in addition to notification as specified in Section 3, Paragraph 7.

Section 4, Paragraph 1:

The limit of 15 g residual sugar was up until now described in detail only in the sweetening process as specified in Section 5, Paragraph 1. The regulation from the old Wine Law 1985 that "sugar or concentrated grape juice can be added for fermentation purposes only" was not taken over into the new Wine Law 1999. Despite this the tolerance limit of 15 g per litre for chaptalization continued to be enforced in order to prevent the production of sweet wines through the addition of sweeteners. A new formulation includes the 15 g per litre limit of the

addition of sweeteners in a clear way that no longer leaves room for legal misinterpretation as did the original phrase “for fermentation purposes only”.

Section 10, Paragraph 4:

European Union labelling laws make it possible for Austrian quality wines with predicate to state the predicate level alone on the label. The previous requirement for a further quality statement for wines with the predicate “Kabinett” is no longer necessary.

Section 10, Paragraph 6:

The Wine Law Amendment 2001 introduced Section 39a, Paragraph 1 in which the Federal Minister for Agriculture, Forestry, Water, and Environment is empowered to establish interprofessional branch organisations. This enabling act includes regulations for creating stipulations for typical regional quality wines of geographic origin upon file of application from these organisations.

The corresponding Interprofessional Branch Organisation Decree (BGB1 II Nr. 138/2001) provides that regional wine committees resolve definitions of stipulations for the production and marketing of typical regional quality wines of geographic origin.

The new Paragraph 6 of Section 10 provides for the possibility to market typical regional quality wines of geographic origin under the designation “Districtus Austria Controllatus” or “DAC”. This market designation is a “traditional specific term” as defined in Appendix VII A Z 2 and anchored in the new commission enforcement decree for EU labelling regulations. This designation takes the place of another quality statement on the label such as Qualitätswein or the various predicate levels.

Section 11, Paragraph 1 Z 7:

Up until now the grapes for the production of Strohwein were required to be dried for a minimum of three months. This strict time regulation proved to be too long under certain weather conditions. In some instances the three-month period minimized the quality of the harvested grapes. The wine law reform has provided for the possibility for improvement of Strohwein by permitting grapes to be pressed after two months storage as long as a minimum must weight of 30° KMW has been reached. If it is discovered afterwards through analysis that the must actually had less than 30° KMW, the wine cannot be labelled as Strohwein even if 25° KMW were reached. As with the old regulations and the regulations for ice wine, this wine must not be devalued as industrial wine, but may be marketed as quality wine without predicate.

The quality designation “Schilfwein” has been provided for in the new wine law. Like other predicate levels this qualifies as a traditional specific term as defined in Appendix VII A Z 2 and anchored in the new commission enforcement decree for EU labelling regulations.

Section 21, Paragraph 3 Z 3:

The wine law reform provides for a new wine area “Steiermark” and the wine region “Steierland”. The other wine areas remain the same just as in the solution for Niederösterreich (Lower Austria) and Burgenland.

5.4 Wine Law Amendment 2003

The new wine law of 1999 (BGBI I Nr. 141) was amended on the 26th of January 2004 with the BGBL I Nr. 3 with the most important points as follows:

§ 3 Paragraph 4:

An effective control (see § 51 Paragraph 1 Z 2) of wine treatment substances currently available on the market necessitates the acquisition of data. Wine treatment substances are allowed to enter the market freely after registration at the merchants own risk. Registration is required not only for new wine treatment substances, but for those allowed before registration became a requirement. Substance registration is mandatory for importers, wholesalers and retailers selling wine treatment substances. A wine treatment substance which has already been reported can be sold without further registration. The listing of a wine treatment substance in the official register means only that it need not be reported again, but says nothing about the legality of the use of the substance. Registration is for documentation purposes only; through submitting a sample and a product description, assessment of a wine treatment substance's legal use can be made.

§ 12 Paragraph 8:

To simplify administration, details for harvest inspection of grapes destined for predicated wines (place, time, etc.) will be listed directly in the legal sanctions for harvest inspection communities. The stipulation for a minimum price continues to be bound to the guidelines of Paragraph 9, stating that the price stipulation is to cover the costs of inspection administration.

Added to Z 6 (§ 16):

Up until now the Federal Ministry for Agriculture, Forestry, Environment and Water Management (BLFUW) was officially responsible for the issue of permits for large research projects. In the future the Federal Winery Inspection will take over this responsibility, which is in actuality confirmation of what has been practiced in the past. The Federal Bureau for Horticulture has cooperated with the Federal Winery Inspection in observing and directing research projects. The adjustment of legal administration, for example appeal on the Minister of Agriculture, Forestry, Environment and Water Management, now follow the changes in § 51 Paragraph 7.

§ 20 Paragraph 3 und 4:

Consumer deception prohibition wins a central focus through the abolition of the prohibition principle through the enactment of the decree (EG) Nr. 753/2002 from the Commission as of 29. April 2002 dealing with enforcement stipulations of the decree (EG) Nr. 1493/1999 of the Council over viticultural product description, labelling, packaging, and protection. Up until now only terms specifically designated and allowed by law could be stated on wine labels (prohibition principle: everything that is not specifically allowed is forbidden). In the future "factual information and information useful to the consumer" (Article 47 Paragraph 2 lit. c of the decree (EG) Nr. 1493/99) is permitted.

The general stipulations for consumer deception prohibition as described in § 20 Wine Law have been enlarged to encompass benefits or attributes that a product does not actually have. To enforce the EuGH jurisdiction in the case C-221/00 “European commission against the Austrian Republic” on the 23rd of January 2003 and the EuGH jurisdiction in the case C-77/1997, Unilever on the 28th of January 1999, § 20 Wine Law 1999 has been amended to stipulate that in case of doubt in labelling the product producer must give proof of information stated on labels. This responsibility also corresponds to the basic principles of Article 6 Paragraph 2 of the VO (EG) Nr. 753/2002 which state that the relevant authorities in each member country are responsible for controlling the correctness of labels specifically pertaining to the product type, identity, quality, ingredients, and/or origin sourced from all producers, dispatchers, and importers.

The enforcement of an assessment process for the interpretation of labelling requirements serves clarification and legal certainty. By submitting an original label, simple theoretical cases can be spared a formal assessment process.

§ 27 Paragraph 1:

Through the abolition of the prohibition principle (see above) health-specific indications are no longer prohibited as long as they are justified and do not deceive the consumer. This is in accordance with the legal status for food products in general.

Consumer deception prohibition is to use the averagely informed consumer as a standard. Terms such as “Gesundheitswein” (health wine) are forbidden according to the findings of VwGH on the 22nd of March 1999, Zl. 98/10/0326/6 – because they are so vague that the average consumer cannot form a clear idea of which positive health benefits are to be interpreted and lead to completely false expectations.

Consumer deception prohibition also applies to the amendment regarding labelling terms with reference to illness. Indications such as “prevents heart attacks” or “prevents strokes” are forbidden, whether they are based on reality or not.

§ 32 Paragraph 2:

The enforcement of an effective wine control necessitates that the diverse authorities that have to with the execution of wine legalities (primarily the Federal Winery Inspection, the Ministry of Viticulture, College and Ministry for Horticulture, and federal financial authorities as well as district administration authorities) register data in a central databank. Every official should have free access to the information for which he is authorized (Article 22 B-VG) without bureaucratic red tape.

A project for centralizing information is currently underway and in its first phase of entering the data from the business registry (§ 32) and from the Federal Ministry for Viticulture (federal inspection numbers). The provinces have also declared their readiness to give access to their viticultural registry data.

Each official department is responsible for the entry and maintenance of its own data; a central office for this purpose only is not planned.

The entry of data from other departments such as the Federal Ministry for Land Survey and Real Estate Registry are planned in the next phase.

§ 39a Paragraph 1:

The Federal Ministry for Agriculture, Forestry, Environment and Water (BMLFUW) may set an additional fee for DAC wines coupled with the federal inspection number fee if petitioned to do so by a Regional Wine Committee. This fee would be collected by the Federal Ministry for Viticulture in Eisenstadt and these funds would then be put to use by the Austrian Wine Marketing for the promotion of DAC wines under consultation with the Regional Wine Committee.

5.5 Wine Law Amendment 2004

The Wine Law Amendment 2004 went into effect with the Agricultural Adaption Law in August 2004. There is now no longer an upper limit for alcohol content after chaptalization. Other details of the wine law such as penal provisions for the violation of regulations for the sealing of concentration apparatus or violation of the regulations for harvest and inventory reports were also adjusted.

Further information for the Wine Law Amendment 2004 may be requested from Mr. Martin Raggam, BMLFUW, Tel. +43 1 71100.

5.6 Wine Law Amendment 2005

The European Parliament and Commission jurisdiction 2003/89/EG from November 10th, 2003 changed the food and beverage labeling requirements RL 2000/13/EG.

What are the new labeling requirements?

- The requirement pertains to the word „contains“ followed by the names of ingredients.
- The Administrative Committee „Wine“ sanctioned the following requirements on October 10th, 2004 (Legislation of the European Commission Nr. 1991/2004 from December 19th, 2004, Register L 344):
 - The declaration of contents can be separated from the other label requirements (packaging volume percentage of alcohol, etc.);
 - a required print size is not defined (the general principles from labeling requirements 753/02 remain valid: easily legible, un-smearable, and large enough print);
 - the use of the chemical formula “SO₂” cannot be used in the declaration of sulfite content, but rather the words “sulfite” or “sulfur dioxide”;
 - the language used must follow the general language principles of the wine trade regulations: declarations used in labeling must be in one or more of the recognized

languages in the place of sale to ensure that consumers have no difficulty understanding the label (the majority of the member states demand that wines be marketed in the official national language – a final list of all required languages is currently being put together by the European Commission);

anticipated labeling and translation for several countries:

"Contains sulphites" in EU languages	
ES	Contiene sulfitos
CS	Obsahuje siřičitany
DA	Indeholder sulfitter
DE	Enthält Sulfite
ET	Sisaldab sulfitid
EL	Περιέχει θειώδη
EN	Contains sulphites
FR	Contient sulfites
IT	Contiene solfiti
LV	Satur sulfiti
LT	Sudėtyje yra sulfitai
HU	Tartalmaz szulfitok
MT	Fih solfiti
NL	Bevat sulfieten
PL	Zawiera siarczyny
PT	Contém sulfitos
SK	Obsahuje siričitany
SL	Vsebuje sulfiti
FI	Sisältää sulfiitteja
SV	Innehåller sulfiter

- These requirements apply to all products under the jurisdiction of the wine trade regulations including grape must, partially fermented grape must, sparkling wine, and wine vinegar.
- No further requirements for flavored wines or spirits have yet been sanctioned.

When do these labeling requirements begin?

- Member states must allow the trade of such labeled products by November 25th, 2004 at the latest.
- The declaration of allergenic contents is obligatory as of November 25th, 2005. The trade of products that were labeled or entered the market before this date are permitted until supplies are deleted.

5.7 Wine Labelling Regulations in Keywords

(excerpt from a summary by the study group of the Federal Winery Inspector's Office)

5.7.1 General Points on Naming and Labelling

The name of a product is an important part of its product information and thus a means by which the seller creates a relationship with the buyer.

The purpose of every name and form of presentation is thus to provide exact and truthful information to the buyer.

New EU labelling laws with apply as of January 1st, 2003. In the case of product names it is necessary to differentiate between **PRESCRIBED** (mandatory) information, which is necessary for the identification of the product and its classification in the appropriate product category and **PERMISSIBLE** (optional) information, which serves more as additional information about the special qualities of the wine.

Certain additional information on wine labels, pertaining for example to the grape variety or vintage, lie under strict parameters. Despite these specific restrictions, a certain liberalization comes into effect as of January 1st, 2003. All labelling terms will be allowed that are not misleading and which can be proved as truthful by the producer. This brings the long expected departure from the **PROHIBITION PRINCIPLE** of the old EU wine labelling regulations where all names and information not expressly permitted by law were forbidden.

Products that are subject to the labelling regulations of EU wine law may not be sold without labels. Each individual bottle must be marked with the required information. This labelling is mandatory not only for sales to consumers but also for shipping. The marketing of unlabelled bottles is illegal, even if the correct labels are provided at the same time.

The **PRESCRIBED** information must be provided either on the label or on several labels glued to the same container in the same visual field. It must be clearly legible, indelible and in sufficiently large letters and must stand out clearly from the background and all other written information and illustrations. Thus the prescribed information must be in the same visual area. Important: it is insufficient for part of the prescribed information to be on the front of the bottle and another part on the back (rear label). The buyer must be able to grasp all the prescribed information at a glance.

PERMISSIBLE information must be provided in the same or another visual area, i.e. on the same label as the prescribed information or on one or several additional labels (exceptions are apparent in the present elaboration).

All the information for wine can also be affixed immediately to the container itself.

The following elaboration of the labelling regulations is given point by point for each product – depending on the visual area. The regulations are cited only in abbreviated form.

When in doubt concerning a particular labelling term, producers are advised to turn to the Federal Ministry for Agriculture, Forestry, Environment, and Water Supply (BMLFUW) for consultation. The following labelling terms serve as a basic guideline for the much larger and more detailed wine labelling regulations.

5.7.2 Austrian *Qualitätswein* (Quality Wine)

1. Prescribed information in the same visual area:

- *Österreichischer...* (Austrian...), *Wein aus Österreich* (wine from Austria), *Österreich* (Austria).
- Wine-growing area (specific area).
 - a) *Qualitätswein* (quality wine) or *Qualitätswein mit Staatlicher Prüfnummer* (quality wine with federal inspection number) or *Qualitätswein bestimmter Anbaugebiete* (quality wine produced in a specific region), or *Qualitätswein b. A.* (quality wine produced in a specific region)
 - b) *Qualitätswein* (quality wine) or *Qualitätswein mit Staatlicher Prüfnummer* (quality wine with state inspection number) or *Qualitätswein bestimmter Anbaugebiete* (quality wine produced in a specific region), or *Qualitätswein b. A.* (quality wine produced in a specific region) and, in addition, *Kabinett* or *Kabinettwein*.
 - c) *Prädikatswein* (predicate wine) or *Qualitätswein (quality wine)* of special ripening and harvesting plus information on the level of *Prädikat* (*Spätlese* etc.).
- Federal inspection number.
- Nominal volume (e may be added).
- *Abfüller* (bottler) or *abgefüllt durch* (bottled by); in the case of contract bottling – *abgefüllt für* (bottled for): name or company name, community or area of the village/town and state of the head office and, if applicable, the actual place of bottling.
- Coding is permitted (company number and postal code as well as information about a marketing participant).
- *Erzeugerabfüllung* (bottled by producer), *Gutsabfüllung* (estate bottled), *Hauerabfüllung* (bottled by wine-grower); these replaced *Abfüller* (bottler).
- Alcohol content in % by volume; only full and half percentage points permitted.
- *Trocken* (sec, dry), *halbtrocken* (demi-sec, medium dry), *lieblich* (demi-doux, semi-sweet), *süß* (doux, sweet).
- Lot identification

2. Additional labelling terms that lie under specific legal parameters:

- Red wine – rosé – white wine.
- Vintage (85%).
- Brand names.
- Marketing participants: position, name or company name, community or area of the village/town of the head office.
- Information about the composition (g/l of residual sugar).
- for "Landwein" and "Qualitätswein": *Heuriger* (wine from the last vintage) (+ vintage), *Bergwein* (+ region), *Schilcher*.
- Sensory qualities that are characteristic of the wine.
- Wine-growing region.
- Smaller geographic units as the wine-growing area (large vineyard site or *vignoble*, community, small vineyard site or *cru* – 85%).
- One (85%) or two or three (100%) and more grape varieties.
- Awards
- Number of the container or the lot.
- Proper names: *Weinkellerei* (winery), *Weinhandlung* (wine merchant).

- *Weingut* (estate), *Weingutsbesitzer* (estate owner), *Winzer* (wine-grower), *Weinbau* (viticulture), *Winzerhof*, *Rebenhof*... (wine-farm).
- Names and terms such as: *Cuvée* (blend), *Gemischter Satz* (mixed grape varieties from the same vineyard, vinified together), *Primus* (new season's wine), *Der Junge* (the young wine), *Der Neue* (the new wine).
- *Gelesen*... (harvested)
- Traditional names such as *Selektion* (selection), *Auswahl* (choice), *Ausstich* (choicest), *Erste Wahl* (first choice), *Klassik* (classic) (or optionally *Classique*)
- *Für Diabetiker geeignet* (suitable for diabetics) if residual sugar is not more than 4 g (currently permitted only in Austria)

5.7.3 Austrian *Landwein* (Vin de Pays)

1. Prescribed information in the same visual area:

- *Österreichischer*... (Austrian...), *Wein aus Österreich* (wine from Austria), *Österreich* (Austria).
- *Landwein* (vin de pays).
- Wine-growing region.
- Nominal volume (e may be added).
- *Abfüller* (bottler) or *abgefüllt durch* (bottled by); in the case of contract bottling – *abgefüllt für* (bottled for): name or company name, community or area of the village/town and state of the head office and, if applicable, the actual place of bottling.
- Coding is permitted (company number and postal code as well as information about a marketing participant).
- *Erzeugerabfüllung* (bottled by producer), *Gutsabfüllung* (estate bottled), *Hauerabfüllung* (bottled by wine-grower); these replaced *Abfüller* (bottler).
- Alcohol content in % by volume; only full and half percentage points permitted.
- *Trocken* (sec, dry), *halbtrocken* (demi-sec, medium dry), *lieblich* (demi-doux, semi-sweet), *süß* (doux, sweet).
- Lot identification

2. Additional labelling terms that lie under specific legal parameters:

- Red wine – Rosé – white wine.
- Brand names.
- Market participants: position, name or company name, community or are of the village/town of the head office
- Information on the composition (only g/l residual sugar).
- *Heuriger* (wine from the last vintage) (+ vintage), *Bergwein* (+ region), *Schilcher*.
- Sensory qualities that are characteristic of the wine.
- Proper name of the company, *Weinkellerei* (winery), *Weinhandlung*... (wine merchant).
- 1 (85%) or 2 or 3 (100%) and more grape varieties.
- Awards.
- Number of the container or the lot.
- Proper names: *Weinkellerei* (winery), *Weinhandlung* (wine merchant).
- *Weingut* (estate), *Weingutsbesitzer* (estate owner), *Winzer* (wine-grower), *Weinbau* (viticulture), *Winzerhof*, *Rebenhof*... (wine-farm).

- Names and terms such as: *Cuvée* (blend), *Gemischter Satz* (mixed grape varieties from the same vineyard, vinified together), *Primus* (new season's wine), *Der Junge* (the young wine), *Der Neue* (the new wine).

5.7.4 Austrian *Tafelwein* (Table Wine)

1. Prescribed information in the same visual area:

- *Österreichischer...* (Austrian...), *Wein aus Österreich* (wine from Austria), *Österreich* (Austria).
- *Tafelwein* (table wine)
- Nominal volume (e may be added)
- *Abfüller* (bottler) or *abgefüllt durch* (bottled by); in the case of contract bottling – *abgefüllt für* (bottled for): name or company name, community or area of the village/town and state of the head office and, if applicable, the actual place of bottling.
- Coding is permitted (company number and postal code as well as information about a marketing participant).
- *Erzeugerabfüllung* (bottled by producer), *Gutsabfüllung* (estate bottled), *Hauerabfüllung* (bottled by wine-grower); these replaced *Abfüller* (bottler)
- Alcohol content in % by volume; only full and half percentage points permitted
- *Trocken* (sec, dry), *halbtrocken* (demi-sec, medium dry), *lieblich* (demi-doux, semi-sweet), *süß* (doux, sweet)
- Lot identification

2. Additional labelling terms that lie under specific legal parameters:

- Red wine – rosé – white wine.
- Brand names.
- Marketing participants: position, name or company name, community or area of the village/town of the head office; *geerntet durch* (harvested by), *verteilt durch* (distributed by) or *importiert durch* (imported by).
- *Für Diabetiker geeignet* (suitable for diabetics) if residual sugar is not more than 4 g (currently possible only in Austria).
- Information about the composition (only g/l residual sugar).
- Sensory qualities that are characteristic of the wine.
- Proper names of the establishment: *Weinkellerei* (winery), *Weinhandlung* (wine merchant)...
- *Weingut* (estate), *Weingutsbesitzer* (estate owner), *Winzer* (wine-grower), *Weinbau* (viticulture), *Winzerhof*, *Rebenhof*... (wine farm).

Note: For *Tafelwein* (table wine) from EU Member states the following must be stated: either

- the name of the member state if the grapes were harvested and the wine produced there (e.g. Italy),
- “*Verschnitt von Weinen aus mehreren Ländern der Europäischen Gemeinschaft*” *) (“blend of wines from several countries of the European Community”) and code for specifying the location of the bottler (i.e. A-2230 = postal code) or

- “*In... aus in... geernteten grapes hergestellter Wein*” (“wine produced in... of grapes harvested in...”) and code for specifying the location of the bottler (i.e. A-2230 = postal code). This information must be provided in the same visual area.

*) If the wine is marketed in Austria, the following abbreviated form can be used: “*Verschnitt aus mehreren Ländern der EG*” “blend from several countries of the EEC”. The appropriate font size must be used.

5.7.5 Austrian *Schaumwein* (Sparkling Wine)

1. Prescribed information in the same visual area:

- *Schaumwein*
- Nominal volume (e may be added)

Taste information:

	sugar content in g/l
brut nature, <i>naturherb</i>	under 3
extra brut, <i>extra herb</i> , extra bruto	0- 6
brut, <i>herb</i> , bruto	under 15
extra dry, <i>extra dry</i> , extra secco	12- 20
sec, <i>dry</i> , secco, asciutto, dry, secco	17- 35
demi-sec, <i>halbtrocken</i> , abboccato, medium dry, semi-sec	33- 50
doux, <i>mild</i> , dolce, sweet, dulce	over 50

Sugar content is expressed in the respective national language.

Instead of the terms “doux”, etc. if the sugar content is above 50g/l it can also be expressed in g/l.

- Alcohol content in % by volume; only full and half percentage points permitted.
- Producer or vendor: NAME, COMMUNITY/STATE.
(Space does not permit the provision of more details here.)

2. Prescribed information in the same or other visual area:

- *Importeur, Einführer* (importer); *importiert durch, eingeführt durch* (imported by): name or company name, community(area) and state.
- Lot identification, in Austria only after a regulation has been issued; mandatory for marketing on the EU market.

3. Authorised information in the same or other visual area:

- Information that is not misleading.
- 1 (85%), 2 or 3 (100%) of the grape varieties. “Pinot” as a synonym for the Burgundy varieties.
- Name of the member state: if the grapes were harvested and the wine was produced and bottled there.
- Medals, prizes and awards.
- Brand names.

4. Prohibited information – examples:

- Misleading information and packaging.
- Smaller geographic units than the state as designation of origin.
- Vintage.
- *Flaschengärung* etc. (bottle fermentation) as well as *Methode Champenoise* or *Champagner Methode* (Champagne method).
- *Hauersekt* (sparkling wine from the wine-grower).
- Mention of health-related effects as well as *natur* (natural), *echt* (genuine), *rein* (pure), *alternativ* (alternative).
- Information about higher quality.
- *Premium* or *Reserve*.

Note:

Third-country wine used as a raw material may come only from certain areas and varieties of Romania. The sense conveyed by the labelling must be: Aus rumänischem Wein hergestellt (produced from Romanian wine). This information must be provided in the same visual area.

The term ***Hauersekt*** (sparkling wine from the winegrower) may be used in Austria for *Qualitätsschaumwein bestimmter Anbaugebiete* or *Sekt b. A.*) (“quality sparkling wine produced in a specified region” or “sparkling wine produced in a specific region”) only if

1. the winery has grown the grapes (quality varieties) and produced the wine made from them itself,
2. the wine was fermented in the bottle according to the traditional method (second fermentation to sparkling wine; from the moment the blend is created it must be constantly aged on its own lees for at least nine months in the same winery and be separated from the sediment by disgorging),
3. it was produced outside the winery under contract because trade regulations prohibit the winery from making sparkling wine,
4. marketing is conducted by the winery that made wine from the grapes,
5. the label specifies the winery, the variety and the vintage,
6. the conditions and labelling requirements for *Qualitätsschaumwein bestimmter Anbaugebiete* (quality sparkling wine produced in a specified region) are met.

Important: The name of the wine-growing area must also appear on the cork. Smaller geographic information than that of the wine-growing area is permitted. If the outside company producing the sparkling wine under contract is in a different community from the winery, the place of manufacture of the sparkling wine is placed in the same visual area. The term *Hauersekt* can also be used by production co-operatives.

The term *Winzersekt* (another term for sparkling wine from the wine-grower) is reserved for German *Qualitätsschaumwein b. A.* (quality sparkling wine produced in a specific region).

Note: If the sparkling wine producer operates vineyards, it may take the wine it produced from them under the above conditions and make and market *Hauersekt*.

6 The Austrian Wine Marketing Board

The AWMB's Purpose, Mission, and Strategy

The purpose of the AWMB is stated in the articles of association:

The purpose of the enterprise is the implementation of marketing measures for Austrian wine, particularly wine produced in Lower Austria (Niederösterreich), Burgenland, Styria (Steiermark) and Vienna (Wien). The enterprise is authorised to undertake any measures and transactions that are useful for realising its purpose.

The AWMB's Mission and Goals

The AWMB supports and co-ordinates the efforts of the Austrian wine industry to maintain quality and sales. Domestically, the goal is to dominate the market segment for *Qualitätswein*. The export of wine in bottles is to be doubled again within ten years (new basis = 2000).

The AWMB's Strategy

The strategy is aimed at creating a balanced marketing mix suited to the respective markets. This means working on image to promote sales as well as active public-relations work supported by advertising.

The AWMB's Financing

The projected income of the AWMB for 2005 is comprised of around EUR 3.18 million in marketing contributions from the wine industry and some EUR 2.5 million in contributions from the provinces. Section 75 Abs 5 (former §68c) of the Wine Law provides for an additional EUR 1.5 million.

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