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AUSTRIAN WINE

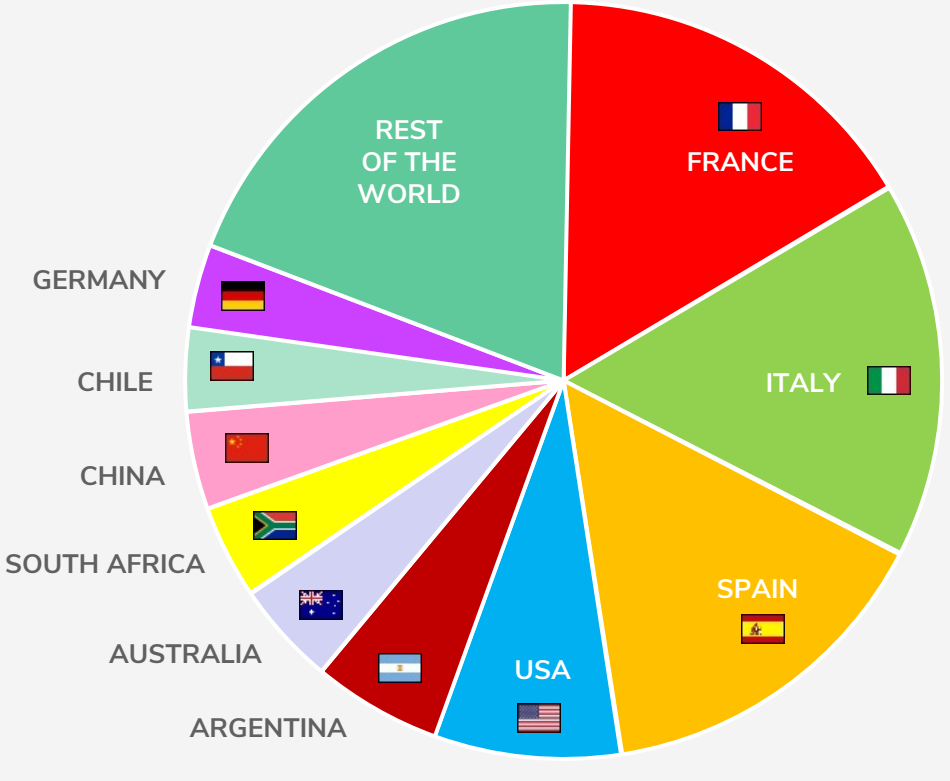


Overview

- World Wine Production
- Austria
  - Wine Growing Regions
  - Grape Varieties
  - Climate
  - Soil
  - Wine Law
  - Export

World Wine Production - Top 10 (2014)

Source: OIV, May 2015



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World Wine Production

(Volume in thousands of hectoliters)

Source: OIV, May 2015

Country	2010	2011	2012	2013	2014
France	44,381	50,757	41,548	42,004	46,698
Italy	**48,525**	**42,772**	**45,616**	**52,029**	**44,739**
Spain	35,353	33,397	31,123	45,650	41,620
United States	20,887	19,140	21,650	23,590	22,300
Argentina	16,250	15,473	11,778	14,984	15,197
Australia	11,420	11,180	12,260	12,500	12,000
South Africa	9,327	9,725	10,569	10,982	11,316
China	13,000	13,200	13,511	11,780	11,178
Chile	8,844	10,464	12,554	12,820	10,500
Germany	6,906	9,132	9,012	8,409	9,334
Portugal	7,148	5,622	6,308	6,237	6,195
Russia	6,400	6,353	6,400	6,200	6,000
Romania	3,287	4,058	3,311	5,113	4,093
New Zealand	1,900	2,350	1,940	2,484	3,204
Greece	2,950	2,750	3,115	3,343	2,900
Rest of World	*27,847*	*30,906*	*27,194*	*31,777*	*31,526*
World	**264,425**	**267,279**	**257,889**	**291,902**	**278,800**

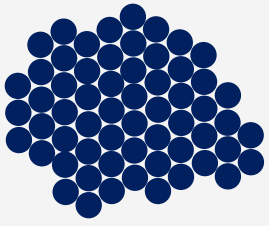
According to the OIV,
the next largest wine producers
for 2014 are:

Brazil (2.8m hl)
Hungary (2.7m hl)
Austria (2.3m hl)
Bulgaria (1.2m hl)
Switzerland (0.9m hl)

Austria - Structure of Estates

In Austria an area of 46,000 ha is cultivated. Presently, this area is cultivated by approximately 20,200 wineries, whereby only 6,000 of them bottle wine. Slightly more than half of the bottling wineries produce between 5,000 and 10,000 litres.

AUSTRIA

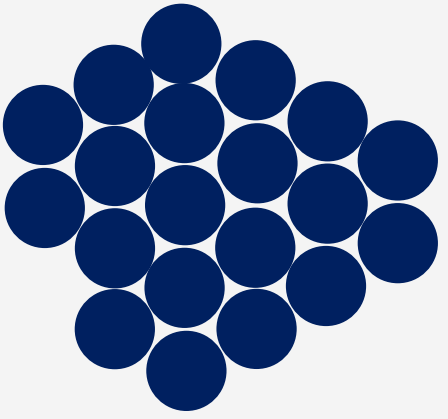


114,000 acres
(46,000 ha)



6,000
Bottlers

AUSTRALIA



405,000 acres
(164,000 ha)



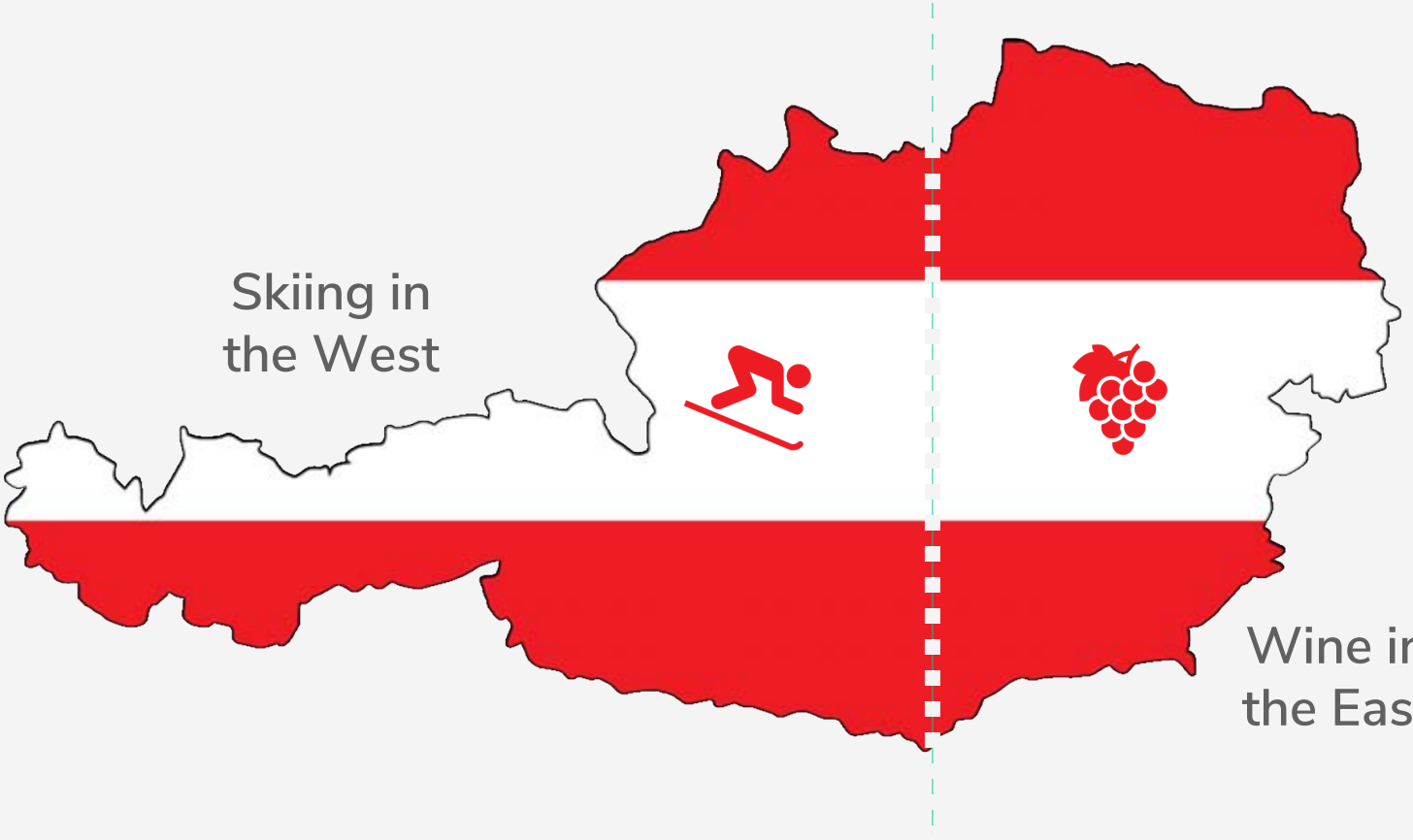
2,000
Bottlers

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Austria - Wine Growing Regions



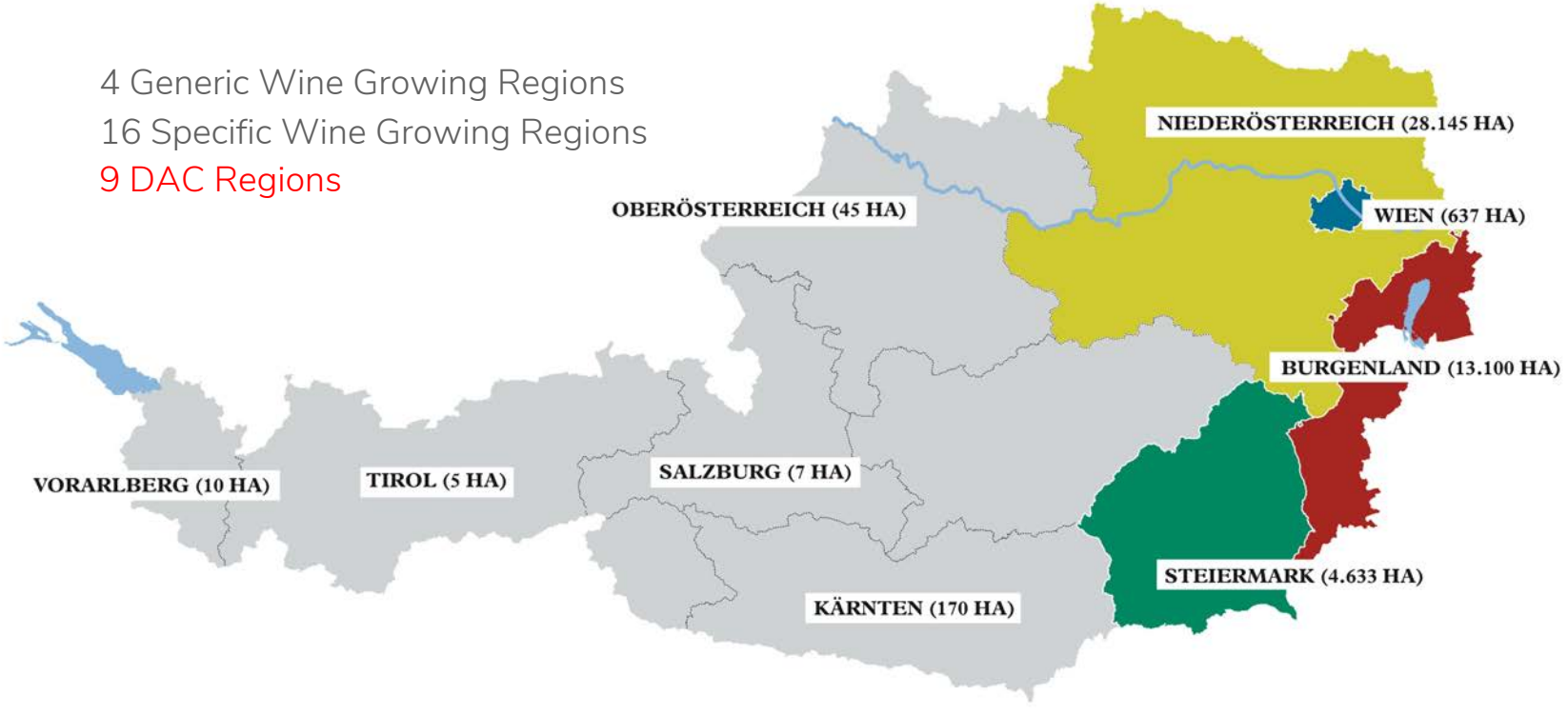
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Austria - Wine Growing Regions

4 Generic Wine Growing Regions
16 Specific Wine Growing Regions
9 DAC Regions



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Austria - Wine Growing Regions

Austria Total: 45,900 ha

Niederösterreich
(Lower Austria): 27,128 ha
(1) Weinviertel 13,356 ha
(2) Kamptal 3,802 ha
(3) Kremstal 2,243 ha
(4) Wachau 1,350 ha
(5) Traisental 790 ha
(6) Wagram 2,451 ha
(8) Thermenregion 2,196 ha
(9) Carnuntum 910 ha

Burgenland: 13,840 ha
(10) Neusiedlersee 7,649 ha
(11) Neusiedlersee-Hügelland 3,576 ha
(12) Mittelburgenland 2,117 ha
(13) Südburgenland 498 ha

Steiermark (Styria): 4,240 ha
(14) Süd-Oststeiermark 1,400 ha
(15) Südsteiermark 2,340 ha
(16) Weststeiermark 500 ha

Wien (Vienna): 612 ha

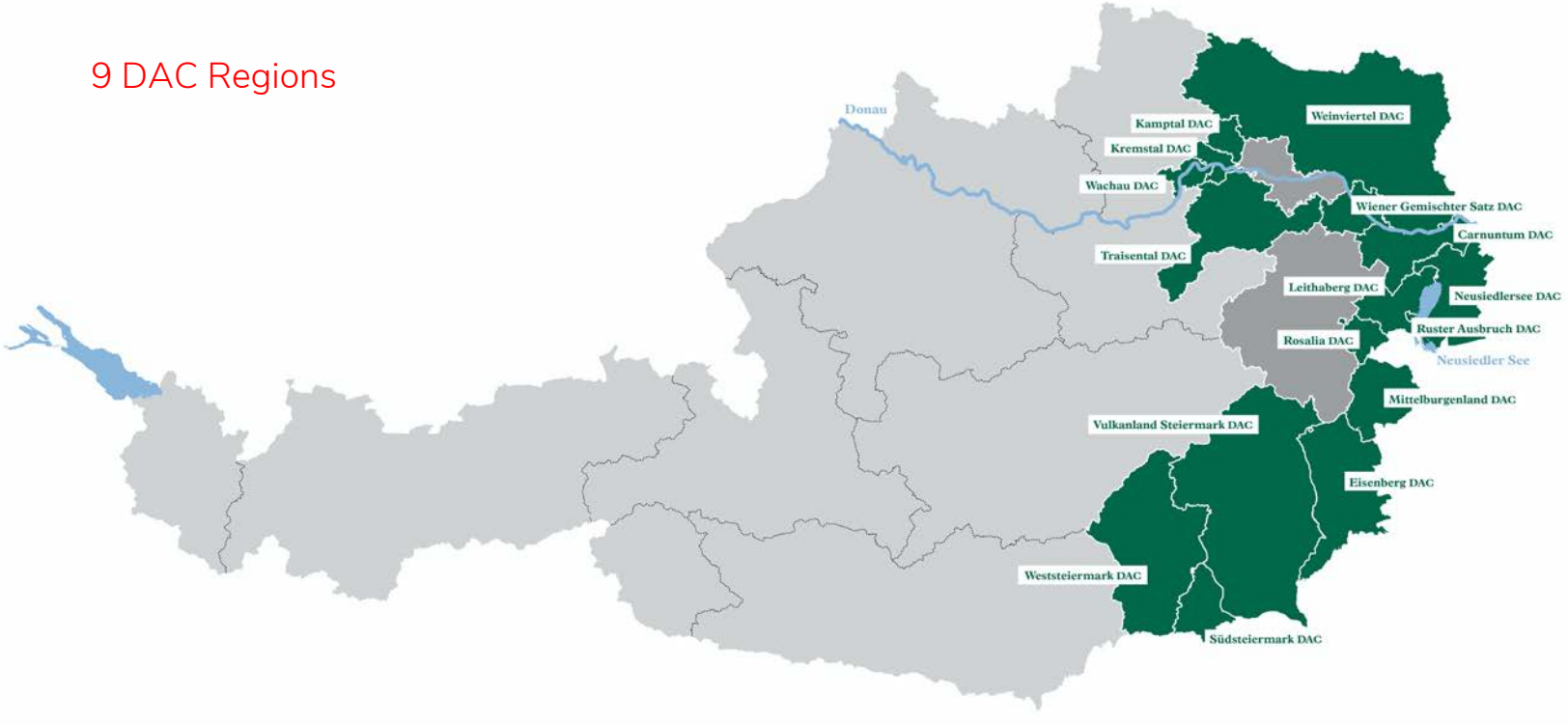
Others: 80 ha

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Austria - Wine Growing Regions

9 DAC Regions



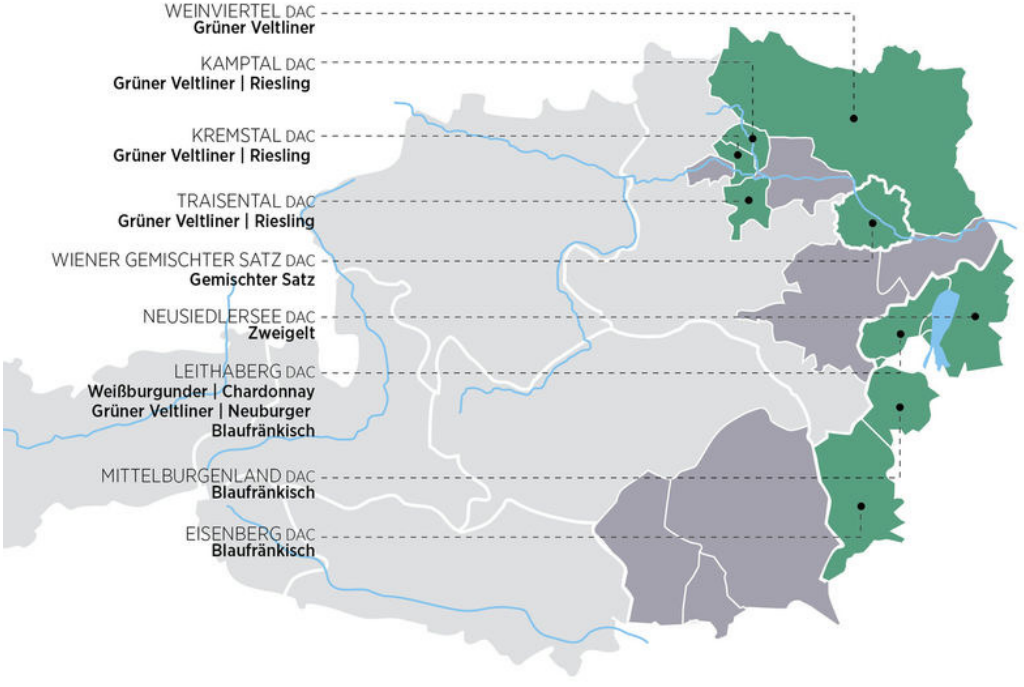
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Austria - Wine Growing Regions

9 DAC Regions
and Grape Varieties



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Austria - Grape Varieties



Austria



65% Whites

35% Reds

Grüner Veltliner	29%
Welschiesling	8%
Weißbergunder & Chardonnay	7%
Müller Thurgau	5%
Riesling	4%
Other Whites	12%
Zweigelt	14%
Blaufränkisch	7%
Blauer Portugieser	4%
Blauburger	2%
St Laurent	2%
Other reds	6%

35 Officially Approved Grape Varieties - 22 White and 13 Red

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The Cistercians (Monks of Citeaux)

In the Middle Ages, Catholic monks were the most prominent viticulturists of the time period.

The concept of pruning for quality over quantity emerged, mainly through Cistercian labors.

In Burgundy, the Cistercian monks developed the concept of cru vineyards as homogeneous pieces of land that consistently produce wines each vintage that are similar.





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The Cistercians (Monks of Citeaux)

10th-12th Century

In this century the Cistercian Monks introduced Burgundian viticulture methods to Austria.

Influenced by History

Also the foundation for today's viticulture on the **Höpler** vineyard, Kirchberg (Church Hill) was laid by the Cistercian monks from the Heiligenkreuz monastery.

King Emmerich donated a tract of land in 1203 and the industrious monks soon realised Kirchberg's potential for winegrowing. Armed with knowledge, love and devotion, the deserted marsh-land was transformed over the years into a true winegrowing paradise.



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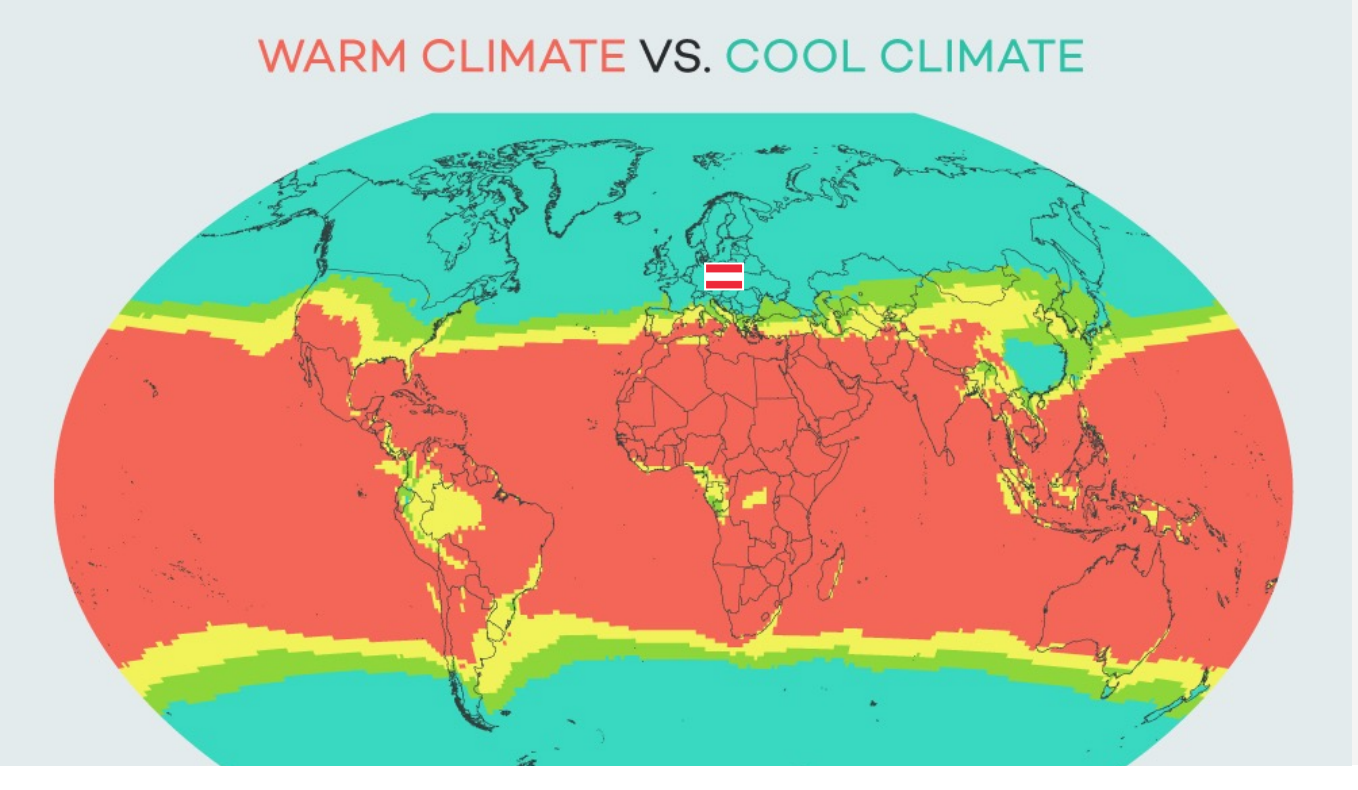
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Austria - Climate

Cool climate wines

- Tend to be higher in acidity and lower in alcohol
- Fresh, fruity & crisp white wines
- Balanced, juicy & spicy red wines



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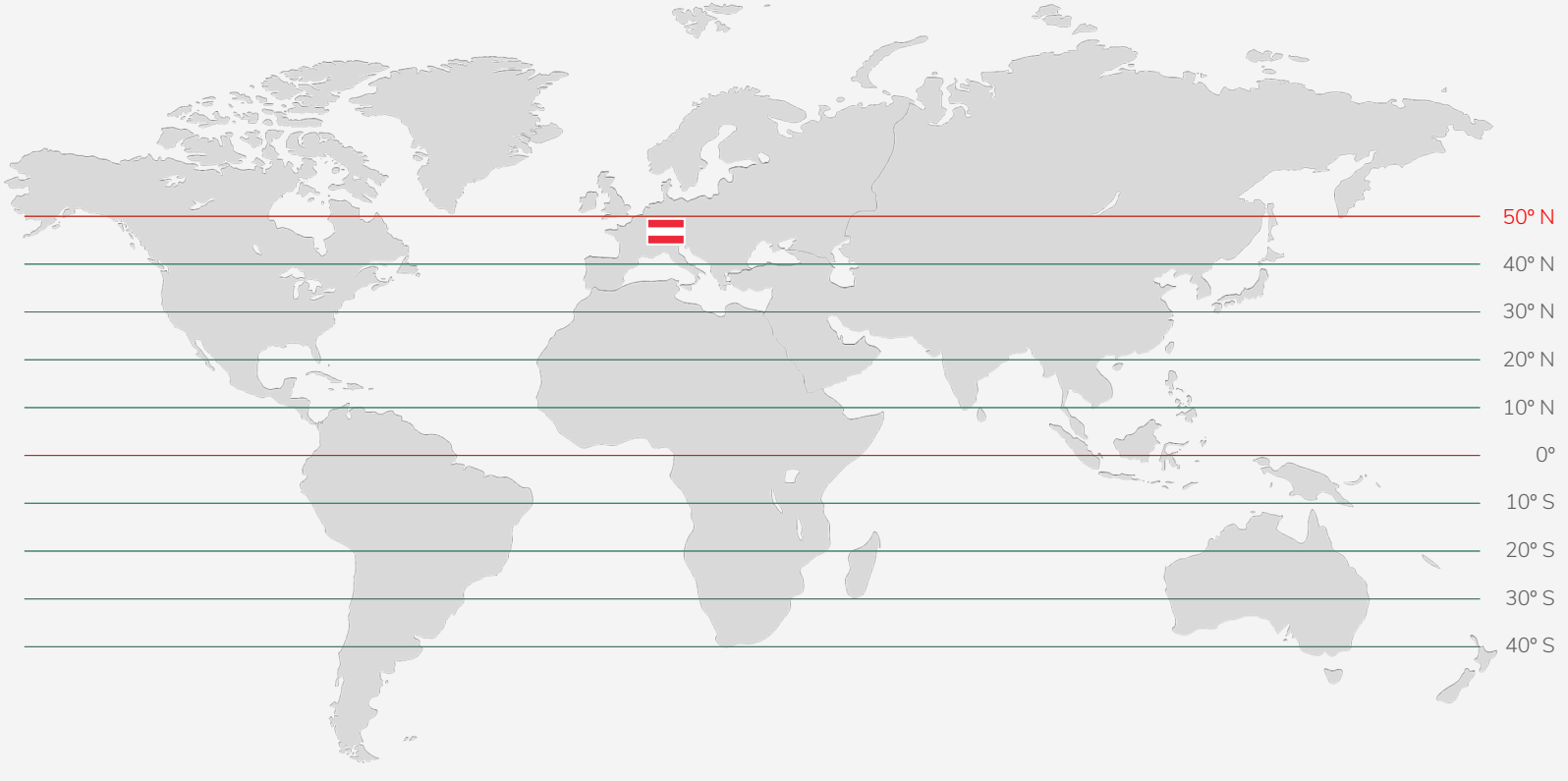
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Austria - Climate

Degrees of Latitude

Napa Valley/CA:	38.5°N	Alto Adige:	46.5°N
Stowe/VT:	44° N	Burgund/France:	47° N
Bordeaux/France:	45° N	**Höpler/Austria:**	**48° N**
Walla Walla Valley/OR-WA:	46° N		



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Climate Categories in Viticulture

The Mediterranean Climate

Moderate to warm temperatures

Close to large bodies of water moderating the region's temperatures (Mediterranean Sea/Ocean)

Hot dry summers and mild rainy winters

Little seasonal change throughout the year

Little rain fall during the grapevine growing season

Long growing seasons

Area around the Mediterranean basin (Italy, Greek, South Spain) as well as e.g. California Coast, South Africa, South Australia

The Continental Climate

Very marked seasonal changes

Hot summers/Cold winters (cold enough for ice and snow)

Irrigation may be needed

Short growing seasons

Often wide diurnal temperature variations (hot days, cool nights)

e.g Burgundy, Walla Walla Valley, Austria

The Maritime Climate

Close to large bodies of water (oceans, estuaries, inland seas), that moderate their temperatures

Share many characteristics with Mediterranean and Continental climate often described as a 'middle ground' between the two extremes

Long growing seasons (like Mediterranean)

Distinct seasonal changes (but not as drastic as continental climate)

Warm summers (rather than hot) and cool winters (rather than cold)

Often subject to the viticultural hazards of excessive rain and humidity e.g. Bordeaux, Napa Valley, Chile, Southern Oregon

The Pannonian Climate

Close to large bodies of water moderating the region's temperatures (Mediterranean Sea/Ocean)

Burgundy

Hot summers/Cold winters (enough for ice/snow)

Ideal amount of rain 680mm (26.77 inches)

No irrigation

2,100 hours sunshine per year

Cold, snowy winters (-12°C/10.4°F)

Hot summer days (37°C/100°F) and mild nights

Lake provides warmth and moisture

High humidity in November

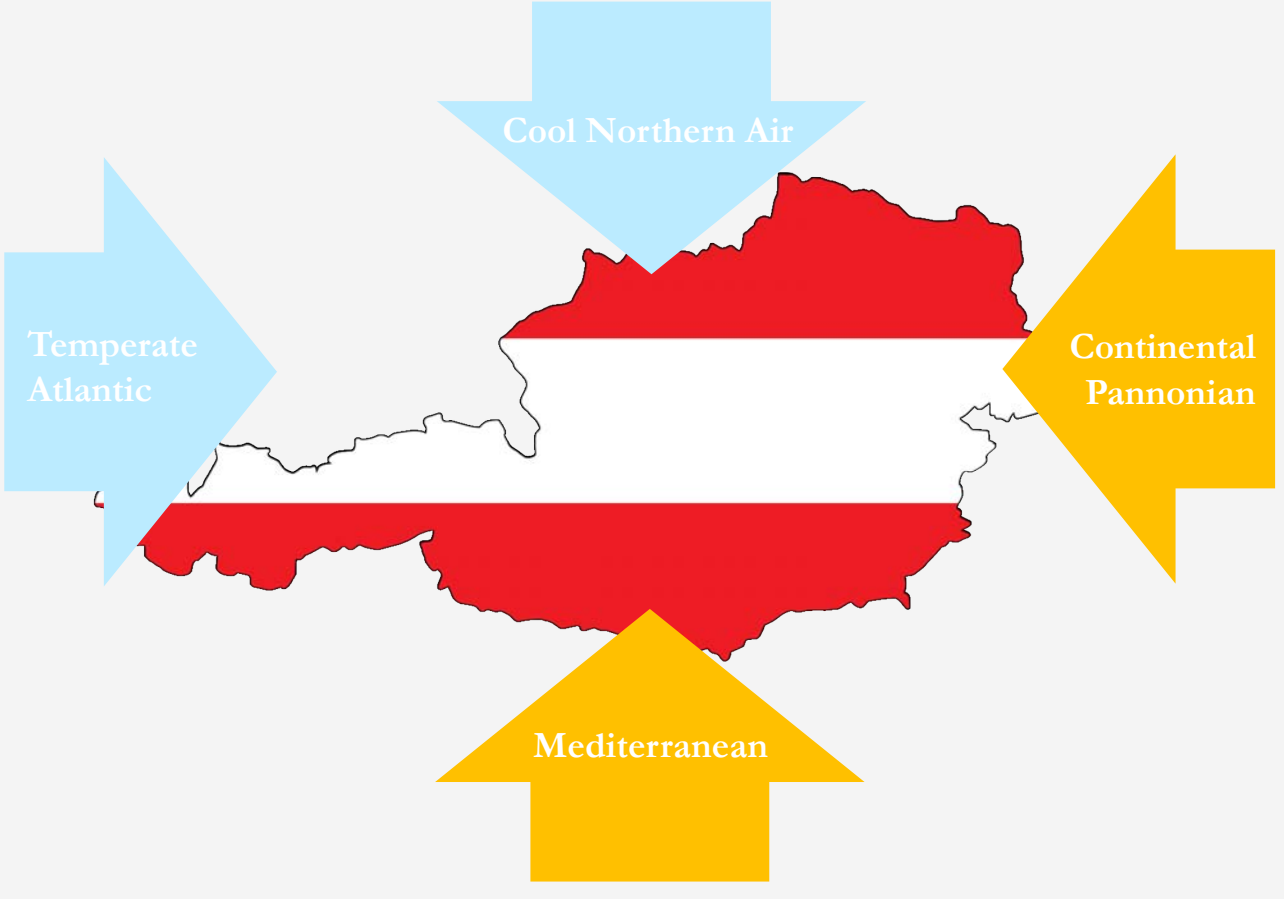


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Climate Influences



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Temperatures

BURGUNDY - FRANCE



Continental Climate
Hot in the summer
Cold in the winter

BURGENLAND - AUSTRIA



Continental Climate
Hot in the summer
Cold in the winter

NAPA - CALIFORNIA



Mediterranean Climate
Mild temperatures
Little seasonal change

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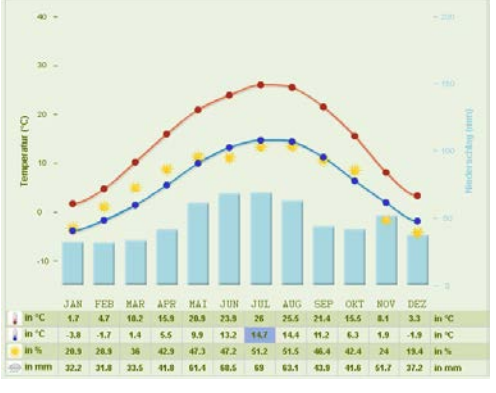
Temperatures and Rainfall

BURGUNDY - FRANCE



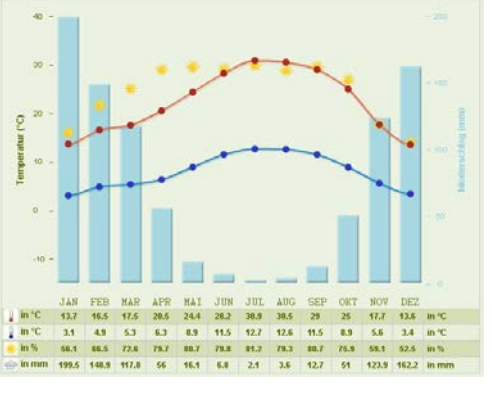
Continental Climate
Hot in the summer
Cold in the winter

BURGENLAND - AUSTRIA



Continental Climate
Hot in the summer
Cold in the winter

NAPA - CALIFORNIA



Mediterranean Climate
Mild temperatures
Little seasonal change

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Lake Neusiedl

Europe's second largest steppe lake

36km long, 6-12km wide

UNESCO World Heritage

Max depth 1.8m

Surrounded by reeds

Climate moderation



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Unique Conditions...

...But obviously related to Burgundy:

Cool climate
Fairly warm summers and cold winters
Plenty of rain
Close-by degrees of latitude
Highly versatile soil profiles
Limestone, loam, sand, gravel, slate

Burgundy Wine Culture

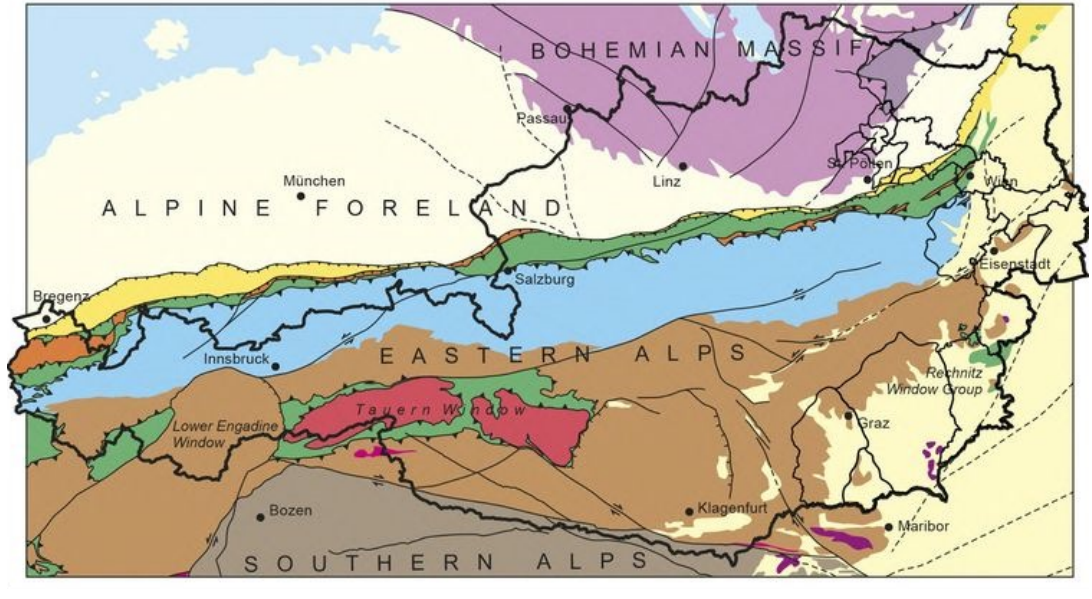
The Cistercians (Monks of Citeaux) brought the Burgundy wine culture to Austria during the 10th to the 12th century.



And to our Kirchberg in Winden!

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Soil - Geological Map of Austria

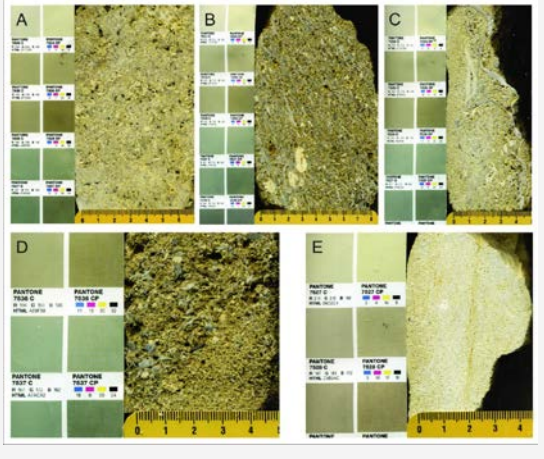


Leitha Limestone

The most striking rock of the area.

Developed in the quiet shallow water of a warm sea that surrounded the Leitha mountain range approximately 16-11 million years ago where small reefs were able to grow.

Leitha Limestone is a consolidated, light-coloured algal limestone and is rich in remains of sea creatures such as mussels, gastropods and sharks.



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The Soil - Classic Most Wanted Terroir

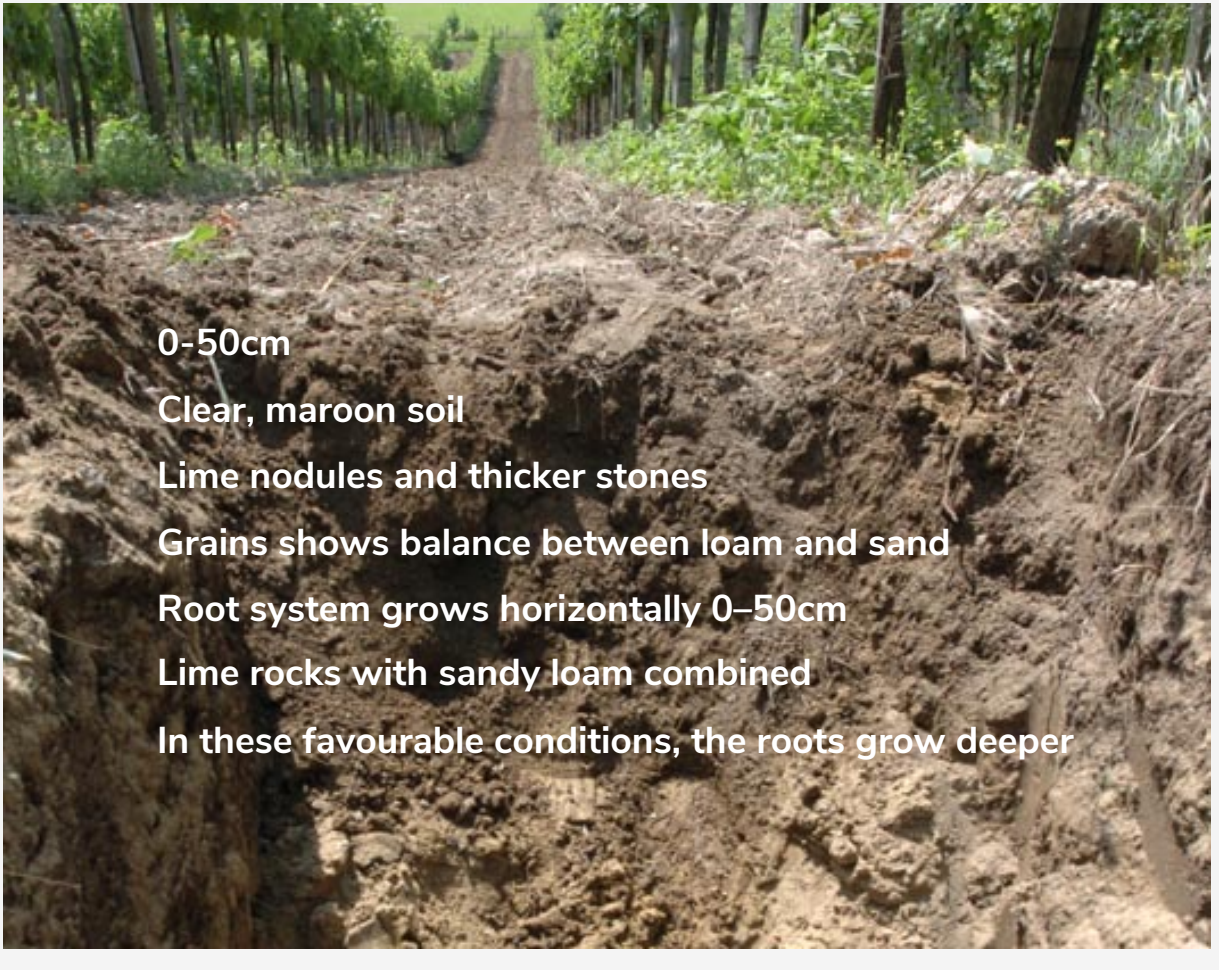
Classic most wanted terroir!

- 0-50cm
- Clear, maroon soil
- Lime nodules and thicker stones
- Grains shows balance between loam and sand
- Root system grows horizontally 0–50cm
- Lime rocks with sandy loam combined
- In these favourable conditions, the roots grow deeper



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The Soil - Classic Most Wanted Terroir



Wine Law - Quality Wine (Qualitätswein)

Wine must be produced from any single variety or blend of the 35 permitted grape varieties for Austrian Qualitätswein.

Must come from the 25 wine-growing regions - generic wine-growing areas (each of the 9 federal states) and 16 specific wine-growing regions of which 9 are DAC areas.

Austrian Qualitätswein (quality wine) is given a unique state control number (for each wine submitted) confirming that the wine submitted has undergone a chemical and sensoric analysis in a federal bureau of oenology.

Quality wines also have the red-white-red (to symbolise the national flag) banderole seal, imprinted with the winery registration number.

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Qualitätswein with Regional Character (DAC)

DAC stands for Districtus Austriae Controllatus.

Territorial representative wines are marked unser the name of the specific area.

Wines that are produced from other grape varieties and styles, are marketed under the name of the generic area (federal state).

LEITHABERG DAC

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Overview of Quality Levels

Wine Without Origin

Must weight: minimum of 10.7° KMW (51°Ö), minimum alcohol: 8,5% vol.

No specific region of origin is permitted. Only the description of ‘Österreich’ and ‘Österreichischer Wein' etc.

Vintage and grape variety are permitted, if the yield per hectare does not exceed the maximum yield for Landwein and Qualitätswein (33 from the 35 registered quality wine grape varieties are currently permitted, the exceptions being Blaufränkisch (grape variety with specific origin) and Pinot Noir. The Minister of Agriculture may, however, pass a decree to include further grape varieties for declaration on the label).

The descriptions of ‘Bergwein’ (all sloped sites with an incline of more than 26% gradient) and ‘Heuriger’ (the vintage must be declared if bottled).

Landwein (Land Wine)

Must weight: minimum of 14° KMW (68°Ö).

Maximum permitted yield: 6,750 l/ha or 9,000kg grapes/ha (as Qualitätswein).

A more specific region of origin declaration than the wine-growing area or larger sites is not permitted on the label.

Quality Wine / Regionally Typical Quality Wine (DAC)

A minimum of 15° KMW. The grapes may only come from the list of classified Austrian varieties and only from one wine-growing area.

Alcohol level: min. 9,0% vol.

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Overview of Quality Levels

Kabinett (Wine)

In addition or different to Qualitätswein (quality wine).

Alcohol level: max. 13,0% vol.

A minimum of 17° KMW.

The harvested grapes may not be chaptalized.

The content of the unfermented sugar (residual sugar) must not exceed 9 g/l for dry wines.

Prädikat Wine Quality

Spätlese

Made from fully ripened grapes.

Must weight of at least 19° KMW.

Refers to wines that may only be released after 1 March in the year after the harvest.

Auslese

Selected grapes (sorted with all unripe, damaged or unhealthy grapes removed).

Must weight of at least 21° KMW.

Refers to wines that may only be released after 1 May in the year after the harvest.

Beerenauslese

Made from over-ripe and/or noble rot grapes.

Must weight of at least 25°KMW.

Refers to wines that may only be released after 1 May in the year after the harvest.

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Overview of Quality Levels

Eiswein

Wine produced from grapes that were in a completely frozen state at the harvest and pressing.

Must weight at least 25° KMW.

Wine from fully ripened and sweet grapes, that were dried for a minimum period of three months on straw or reeds, or hung up to dry, prior to any form of processing.

Must weight of at least 25° KMW.

Ausbruch

Wine produced completely from dried, noble rot grape berries.

For a more effective extraction of the natural sugar content in the must, fresh grape juice or wine of the minimum quality level of Spätlese, Auslese or Beerenauslese from the same site may be added, to ensure that the minimum must weight of 27° KMW is achieved.

Must weight of at least 27° KMW.

Trockenbeerenauslese

Wine produced primarily from dried, noble rot grape berries.

Must weight of at least 30°KMW.

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Noble Sweet Wines

Austria's Liquid Gold

Burgenland, with its extraordinary microclimate around Lake Neusiedl, almost seems as if it was selected especially for the creation of these wines:

Beerenauslese

Made from over-ripe and/or noble rot grapes.

Must weight of at least 25° KMW (127 °Oe).

Trockenbeerenauslese

Wine produced primarily from dried, noble rot berries.

Must weight of at least 30° KMW (138.5 °Oe).

Eiswein

Wine produced from grapes that were in a completely frozen state at the harvest and pressing.

Must weight at least 25° KMW (127 °Oe).



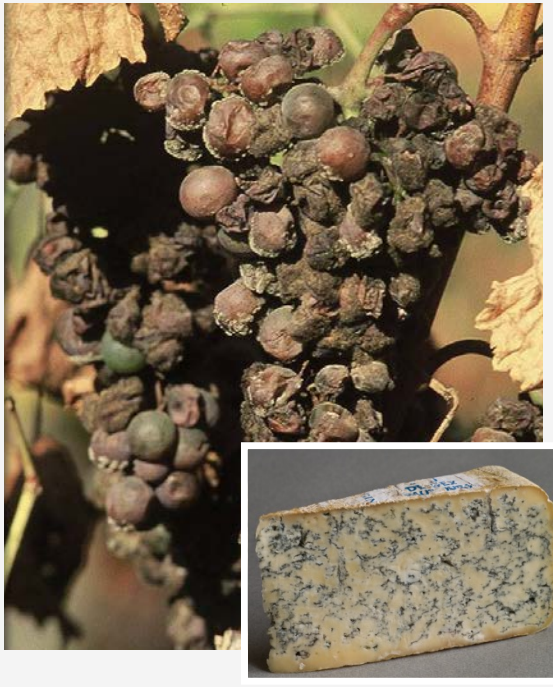
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Noble Sweet Wines

Botrytis – Noble Rot



Frozen grapes







Beerenauslese
Trockenbeerenauslese

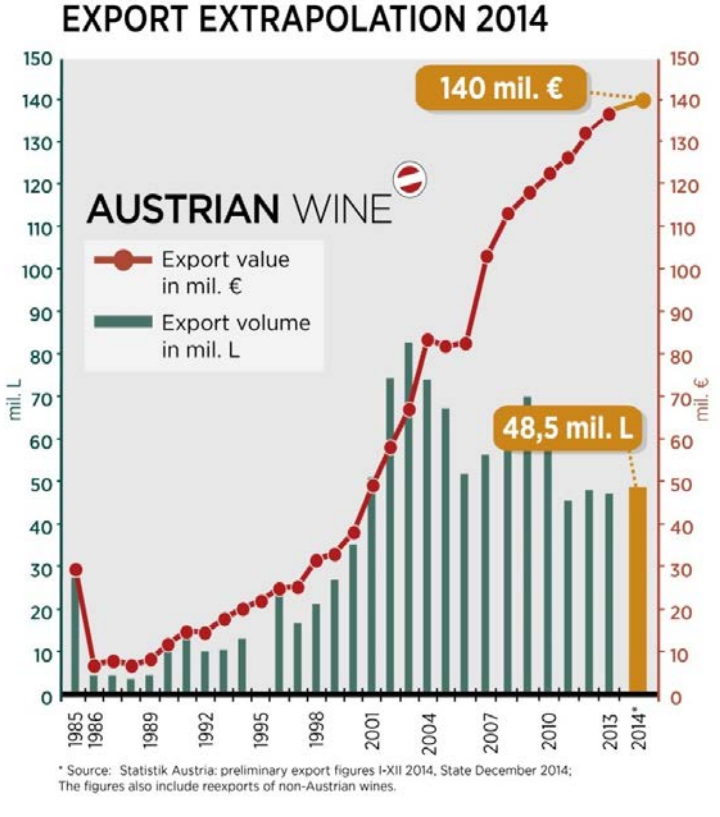
Eiswein

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Export



152 mil $

12.8 mil Galons

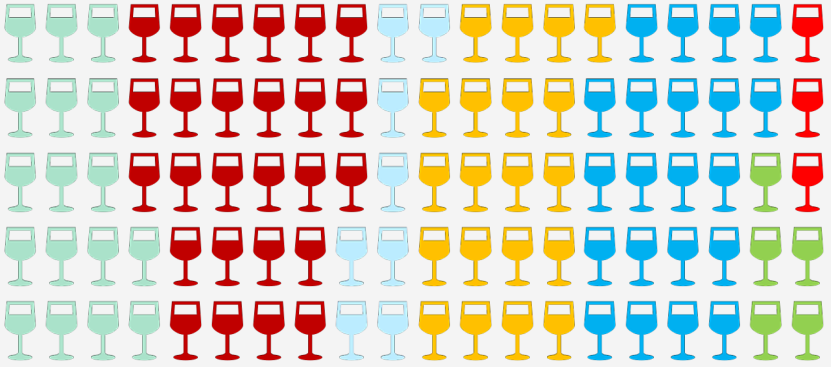
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Main Export Countries

Höpler



Germany	17%
USA	26%
Scandinavia	8%
Netherlands	20%
UK	21%
Finland	5%
Denmark	3%

Austria



Germany	75%
USA	4%
Scandinavia	5%
Switzerland	5%
Other	11%

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Conclusion

Unique climate and soil conditions

A long history of wine production
with consistently high quality product

A well regulated industry
with high standards

Easy to do business with...

...most importantly with **Höpler!**

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