



PLUMPTON
COLLEGE

The English sparkling wine phenomenon

A presentation for

The Limburg wine-growing congress

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PLUMPTON
COLLEGE



Plumpton Wine Centre



- Undergraduate programmes in Wine Business & Production
- MSc Viticulture & Oenology, research
- WineSkills industry training
- Commercial vineyards and winery
- Level 3 teaching and apprenticeships

An international centre for excellence in wine training, education and research

The United Kingdom...

Is a country with a significant history in winemaking, but no tradition

Is a producer of both English and British wine

Has population with a keen interest in wine, particularly fine wine

Is the most important wine trade centre in the world?

Experienced a revival of English wine in the 1960s, influenced by German winemakers

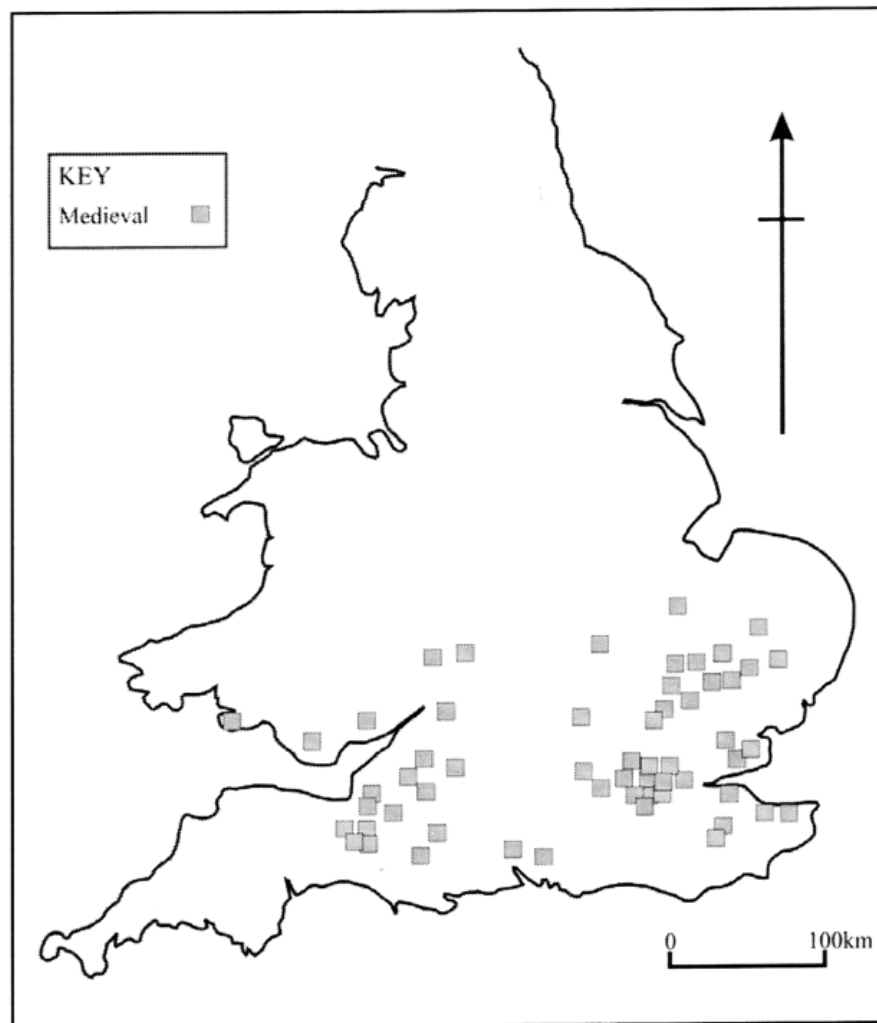
Is now successfully focusing on sparkling wine production by the traditional method





Wollaston Roman vineyard

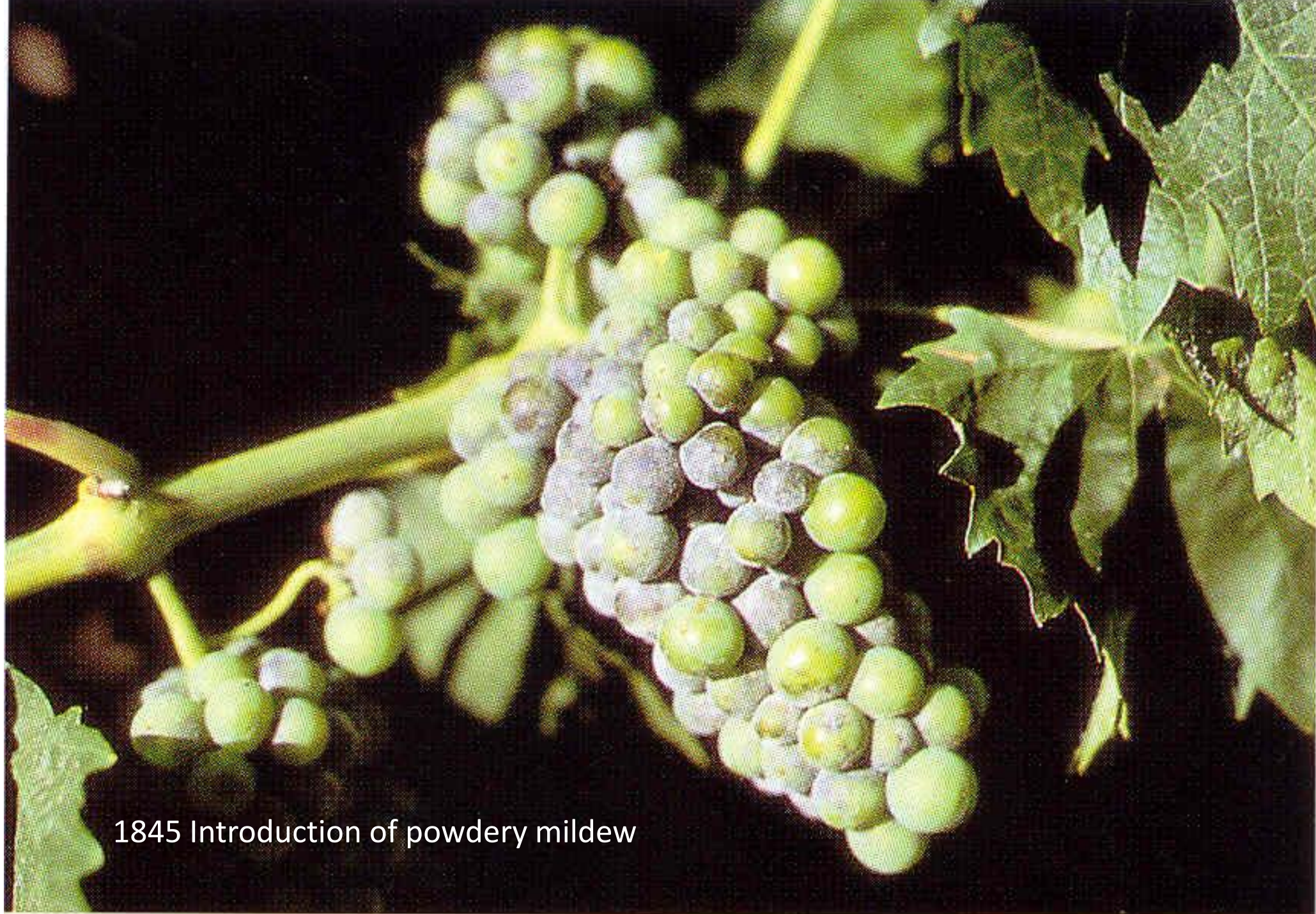
Selley, R.C. 2008



Map of vineyards of the Medieval Warm Period

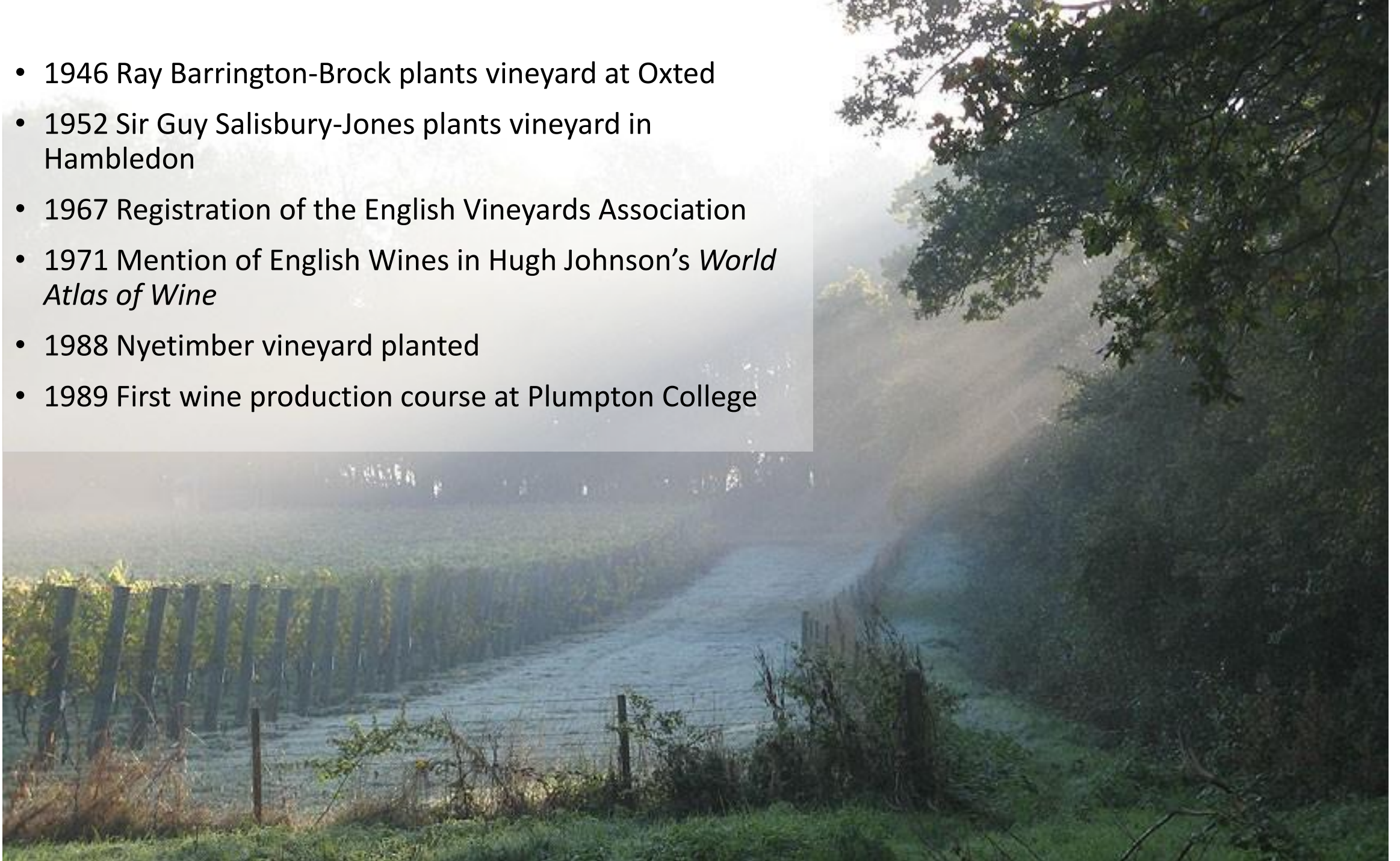


1662 – Christopher Merrett documents bottle-ferment sparkling wine



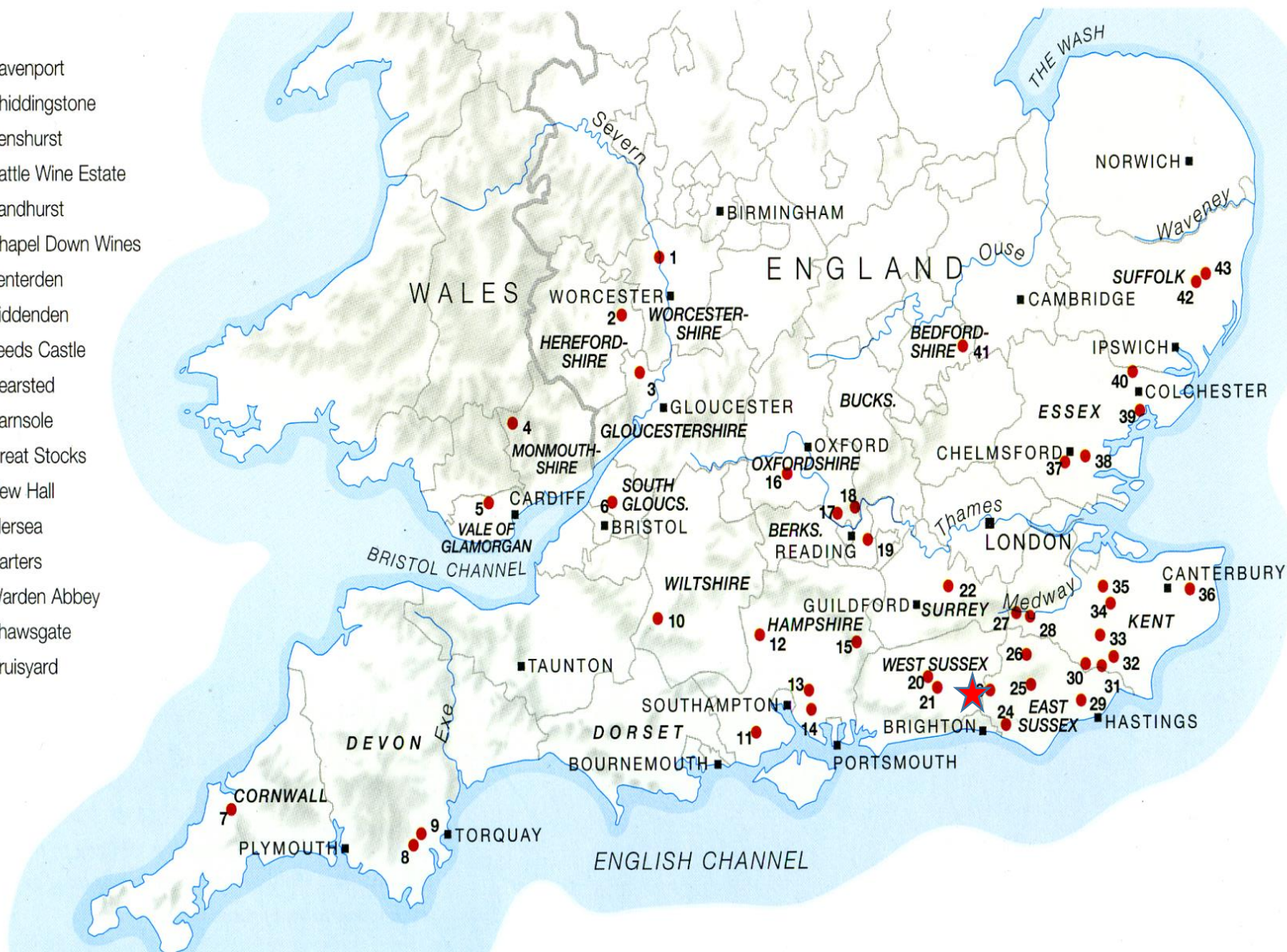
1845 Introduction of powdery mildew

- 1946 Ray Barrington-Brock plants vineyard at Oxted
- 1952 Sir Guy Salisbury-Jones plants vineyard in Hambledon
- 1967 Registration of the English Vineyards Association
- 1971 Mention of English Wines in Hugh Johnson's *World Atlas of Wine*
- 1988 Nyetimber vineyard planted
- 1989 First wine production course at Plumpton College

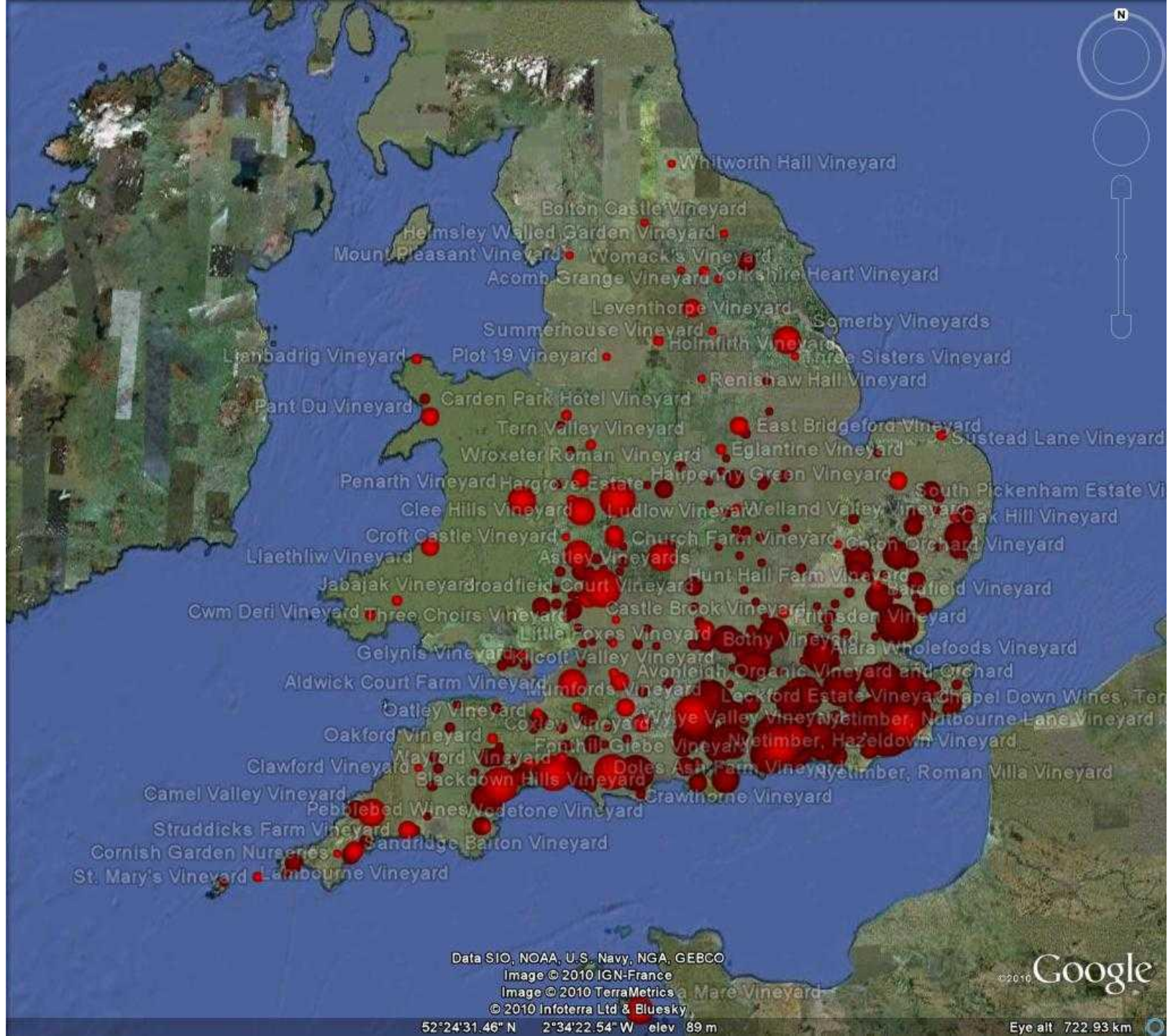


● SELECTED VINEYARDS

- | | |
|------------------------|------------------------|
| 1. Astley | 26. Davenport |
| 2. Frome Valley | 27. Chiddingstone |
| 3. Three Choirs | 28. Penshurst |
| 4. Sugar Loaf | 29. Battle Wine Estate |
| 5. Llanerch | 30. Sandhurst |
| 6. St Augustine's | 31. Chapel Down Wines |
| 7. Camel Valley | 32. Tenterden |
| 8. Beenleigh Manor | 33. Biddenden |
| 9. Sharpham | 34. Leeds Castle |
| 10. Wylle Valley | 35. Bearsted |
| 11. Beaulieu Abbey | 36. Barnsole |
| 12. Danebury | 37. Great Stocks |
| 13. Northbrook Springs | 38. New Hall |
| 14. Wickham | 39. Mersea |
| 15. Priors Dean | 40. Carters |
| 16. Bothy | 41. Warden Abbey |
| 17. Boze Down | 42. Shawsgate |
| 18. Chiltern Valley | 43. Bruisyard |
| 19. Valley Vineyards | |
| 20. Nutbourne | |
| 21. Nyetimber | |
| 22. Denbies | |
| 23. Ridgview | |
| 24. Breaky Bottom | |
| 25. Hidden Spring | |



Some of the major present-day vineyards



Data SIO, NOAA, U.S. Navy, NGA, GEBCO

Image © 2010 IGN-France

Image © 2010 TerraMetrics

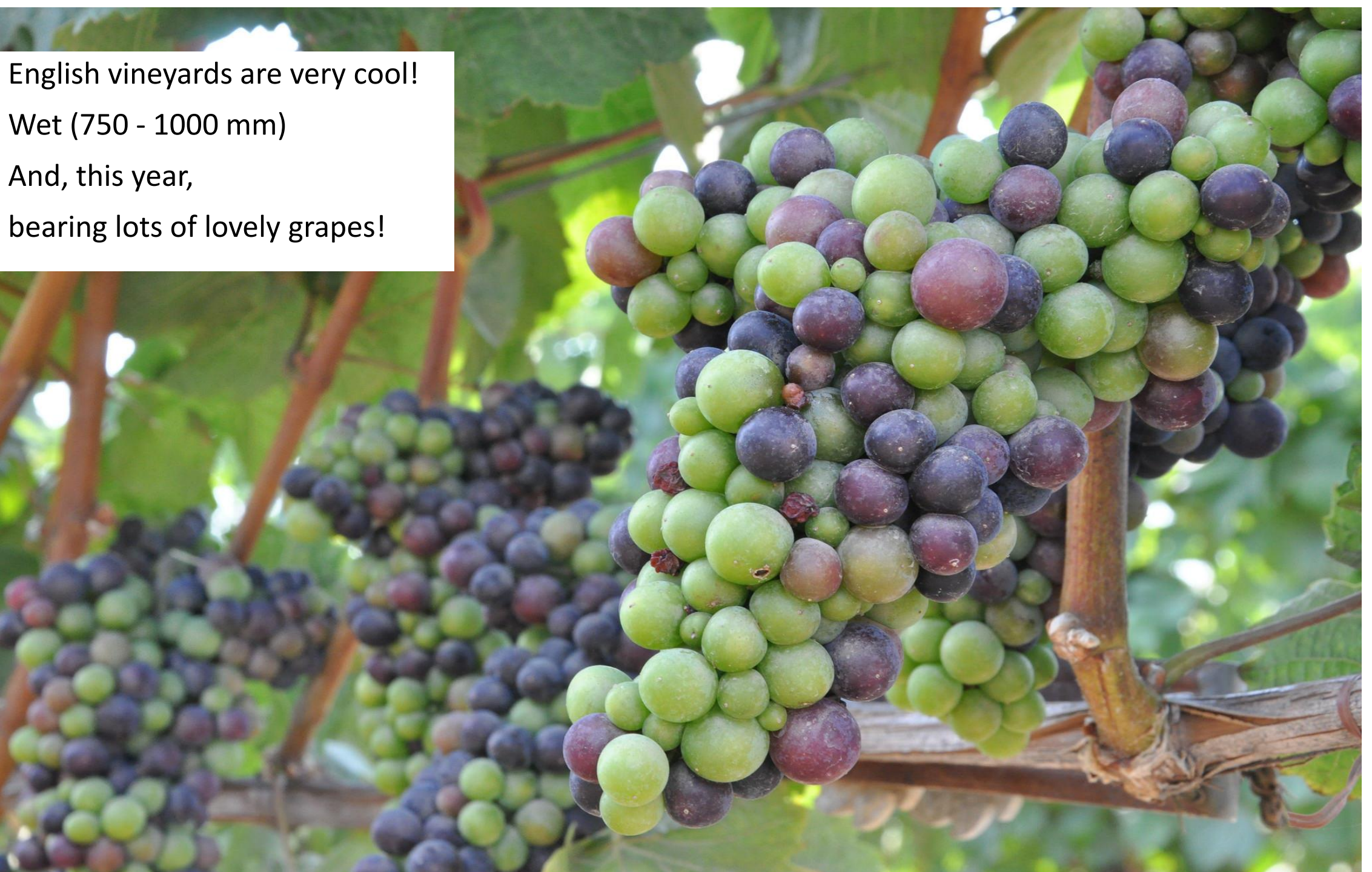
© 2010 Infoterra Ltd & Bluesky

52°24'31.46" N 2°34'22.54" W elev 89 m

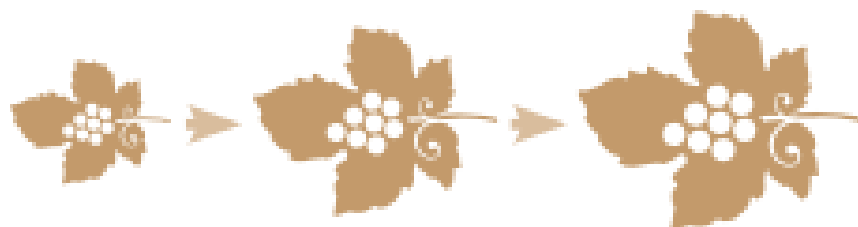
©2010 Google

Eye alt 722.93 km

English vineyards are very cool!
Wet (750 - 1000 mm)
And, this year,
bearing lots of lovely grapes!



Hectarage planted in Great Britain has **grown** by **150%** in the last 10 years & **tripled** since 2000.



Number of
commercial vineyards

502

(2015 figures)

Number of **wineries**

147

(2017 figures)

Data supplied by Wine Standards Branch,
Food Standards Agency

Hectarage **under vine**

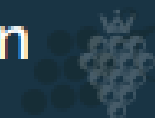


In 2017, **1m vines** were planted
in UK, the highest number
planted in a single year.
This year a predicted **1.5-1.7m**
vines will be planted.

Approximate. Includes plantings in 2017
Data supplied by WineGB/Wine Intelligence

Annual **production**

BOTTLE EQUIVALENT



Based on data collected at post harvest each year -
2014, 2015 & 2016 supplied by Wine Standards Branch,
Food Standards Agency, 2017 supplied by WineGB.

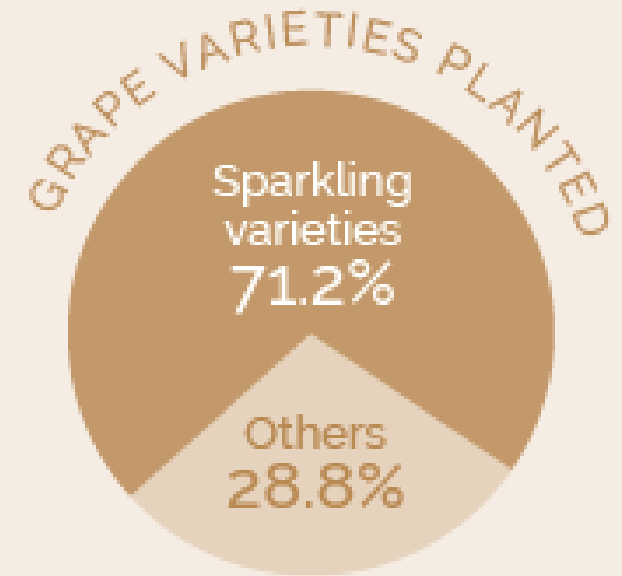
40m

Wine production is predicted to
reach some **40m bottles by 2040.**

Data supplied by WineGB/Wine Intelligence

Top grape varieties planted

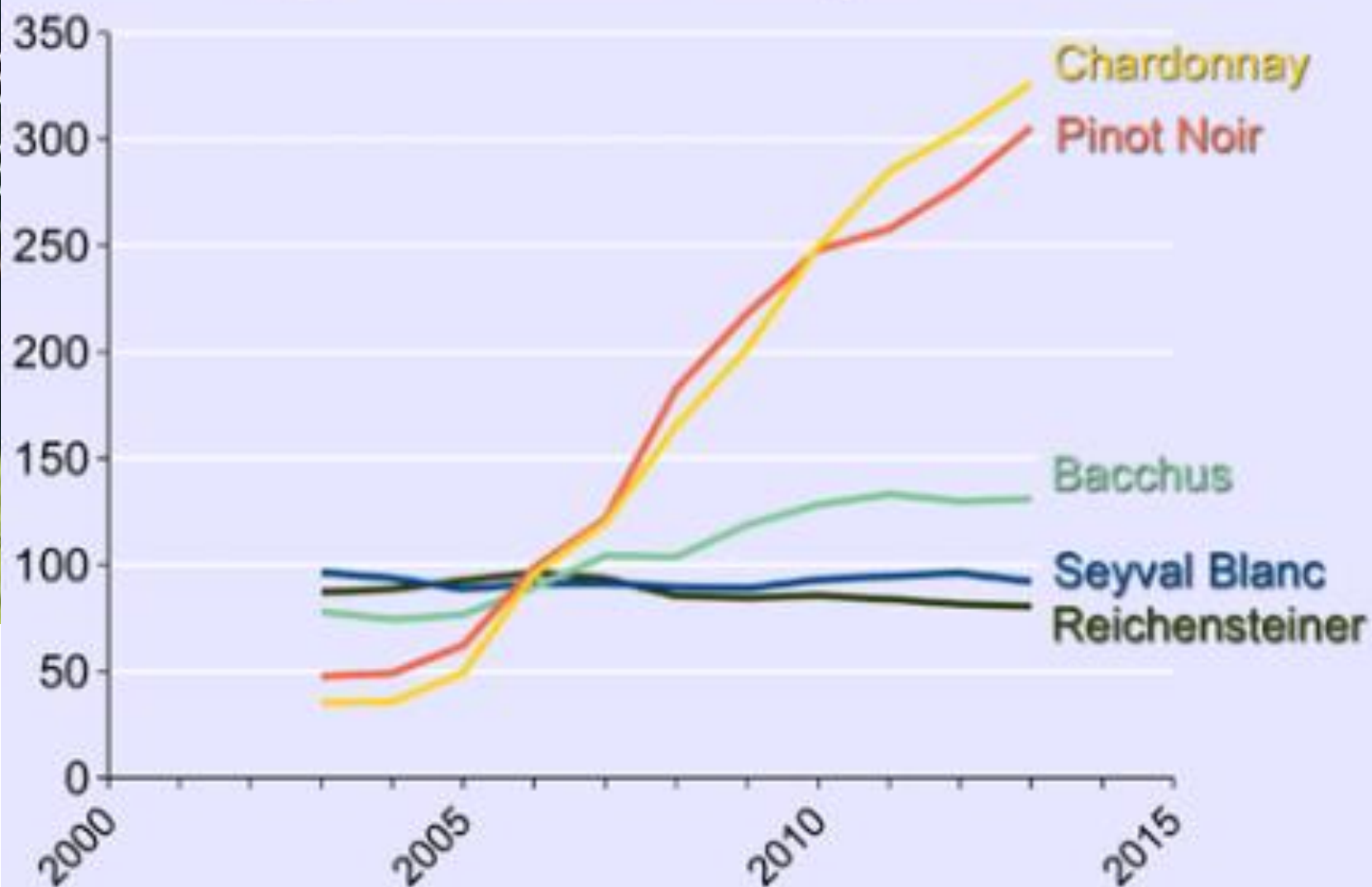
RANK	VARIETY	% TOTAL HECTARAGE	HA PLANTED
1st	Pinot Noir	31.5%	803 ha
2nd	Chardonnay	30.2%	771.1 ha
3rd	Pinot Meunier	9.5%	243.4 ha
4th	Bacchus	5.6%	143.6 ha
5th	Seyval Blanc	4.0%	101.2 ha
6th	Pinot Blanc	2.1%	54.1 ha
7th	Reichensteiner	1.9%	49.5 ha
8th	Muller Thurgau	0.2%	4.8 ha
9th	Others	5%	382 ha



Sparkling varieties
Pinot Noir, Chardonnay
and Pinot Meunier
account for **71.2% of all**
grapevines planted.

THE B
WINE
A FEW

England & Wales: Vineyard Area

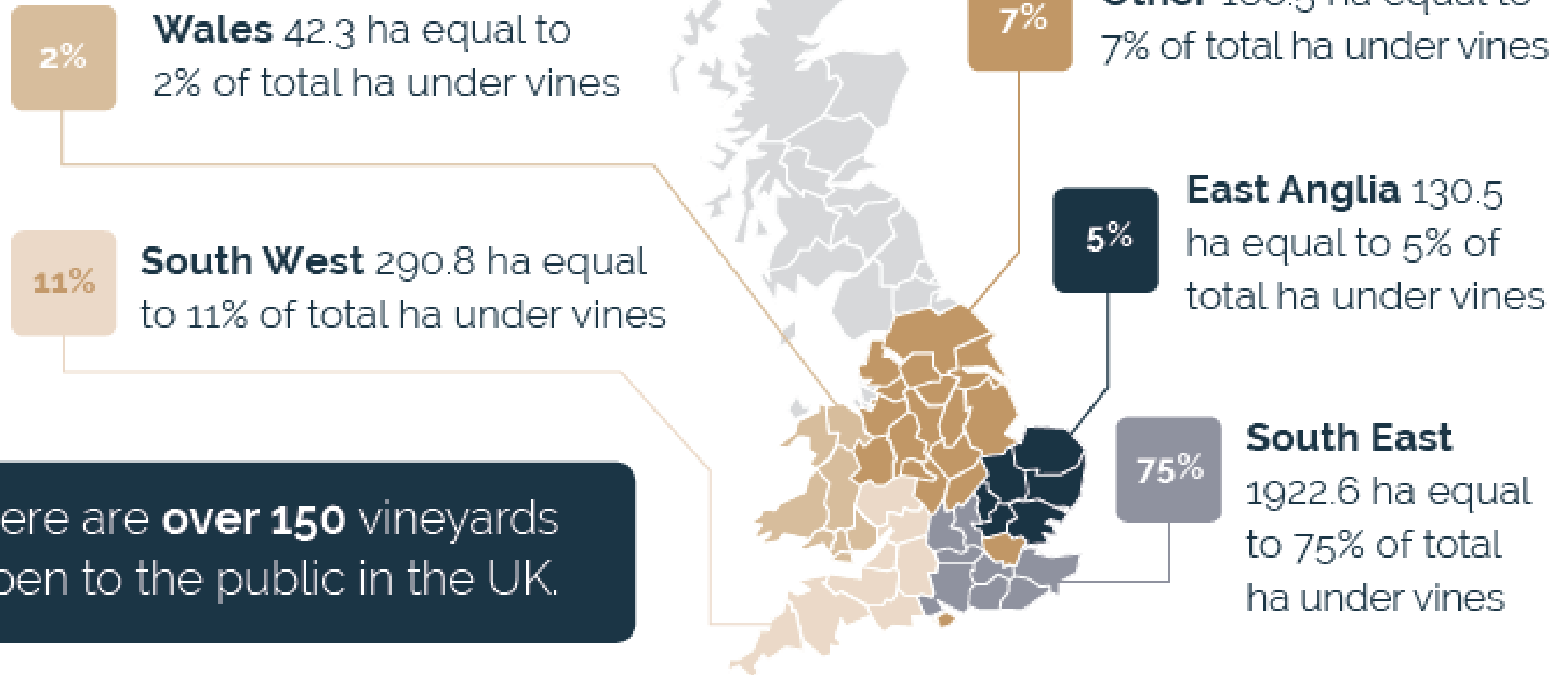


Source: Food Standards Agency. pers. com., 31 Jan 2014

EGB
T BRITAIN

Image © Getty Images 2018

Wine producing regions in Great Britain



2017 figures, data supplied by WineGB.

THE ENGLISH & WELSH WINE INDUSTRY 2018

A FEW FACTS & FIGURES

Wine styles

Sparkling wines from classic and non-classic
varietals made by the traditional method

Light, aromatic, crisp dry and off-dry whites

Many single varietals

Fruity rosé wines (Dornfelder & Pinot Noir)

Light-bodied reds (Dornfelder)

Wine styles

BOTTLES PRODUCED



Data supplied by WineGB
/Wine Intelligence.

Exports



27
countries

English wine is now **exported to 27 countries** – up from 19 in 2015.



Key markets include the **US, Scandinavia & Japan.**

4%

Currently around **4% of all English wine produced is exported.**

THE ENGLISH & WELSH WINE INDUSTRY 2017 A FEW FACTS & FIGURES

Sales of English & Welsh wine

BOTTLES OF WINE SOLD IN 2017

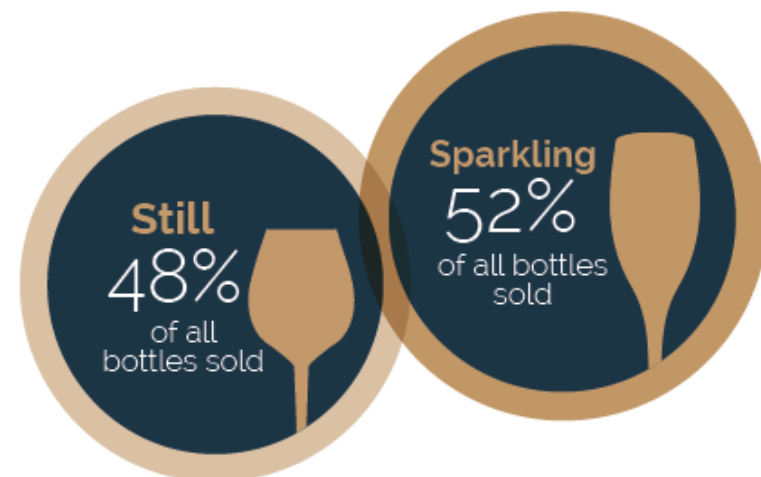
+31% since 2015

Data supplied by WineGB/Wine Intelligence.

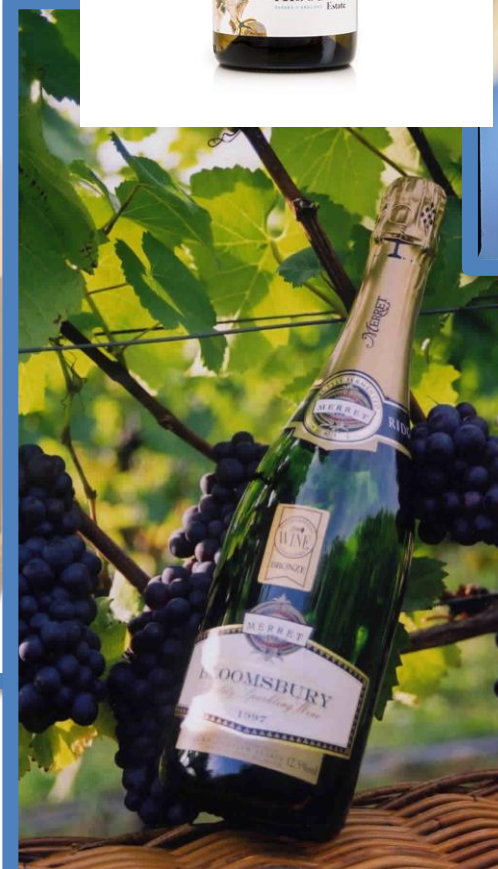


WINEGB
WINES OF GREAT BRITAIN

Distribution of bottles sold **by type**



Data supplied by WineGB/Wine Intelligence.



Competition successes



In the last 16 years* English sparkling wines have won no less than 15 International Trophies in global competitions:

9 TROPHIES FOR BEST INTERNATIONAL SPARKLING WINE:

- International Wine & Spirit Competition
- Decanter World Wine Awards
- Proefschrift Wine Competition, Holland
- Bollicine del Mondo, Italy

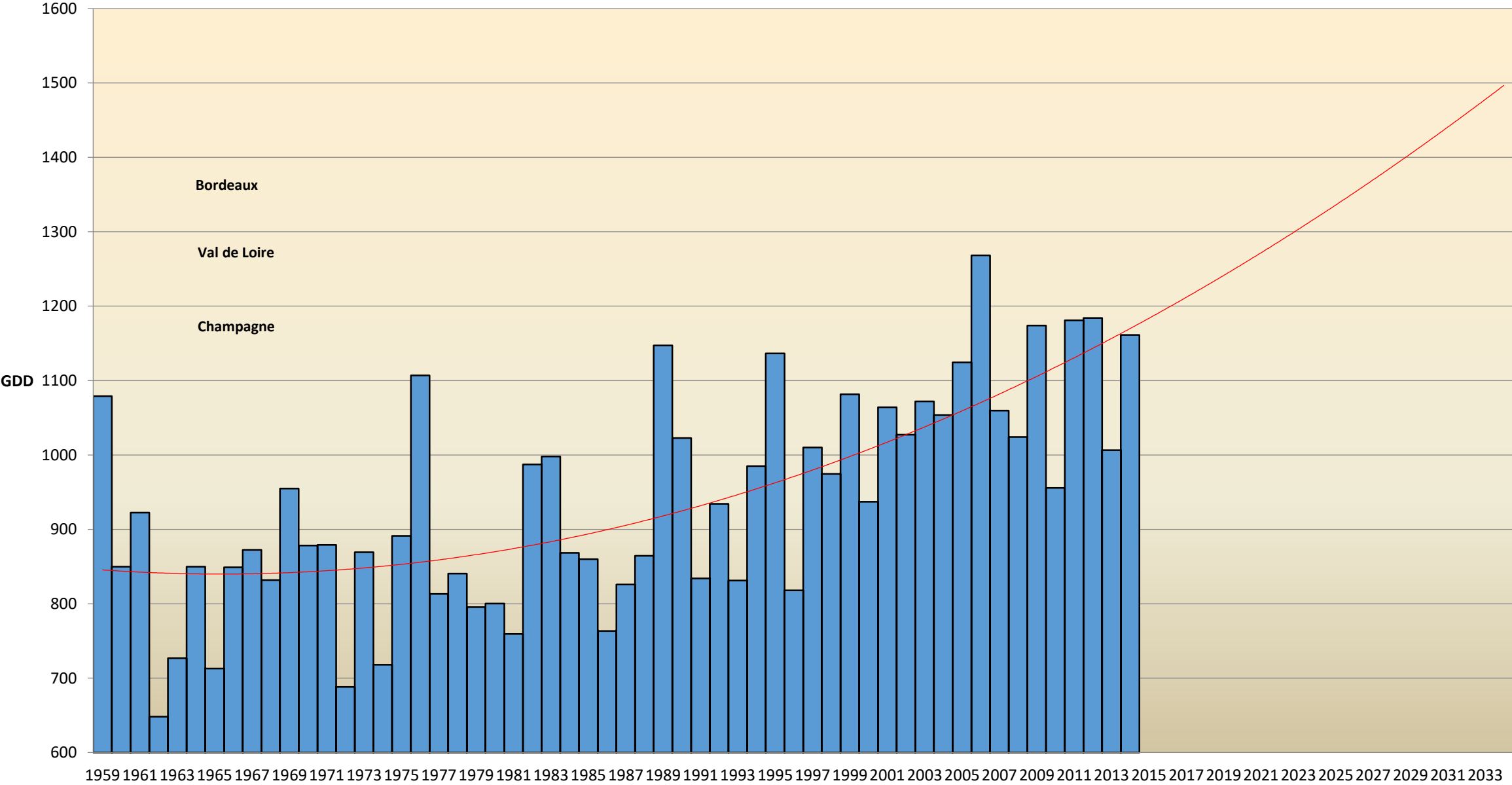
6 TROPHIES FOR BEST SPARKLING ROSÉ:

- International Wine Challenge
- Champagne & Sparkling Wine World Championships
- Bollicine del Mondo
- Rosé du Monde, France
- China Wine Awards

Potential for development



Eastbourne Historical GDD



UK sparkling wine volume size

The UK was the fastest growing top 10 market for sparkling wine between 2012 and 2013



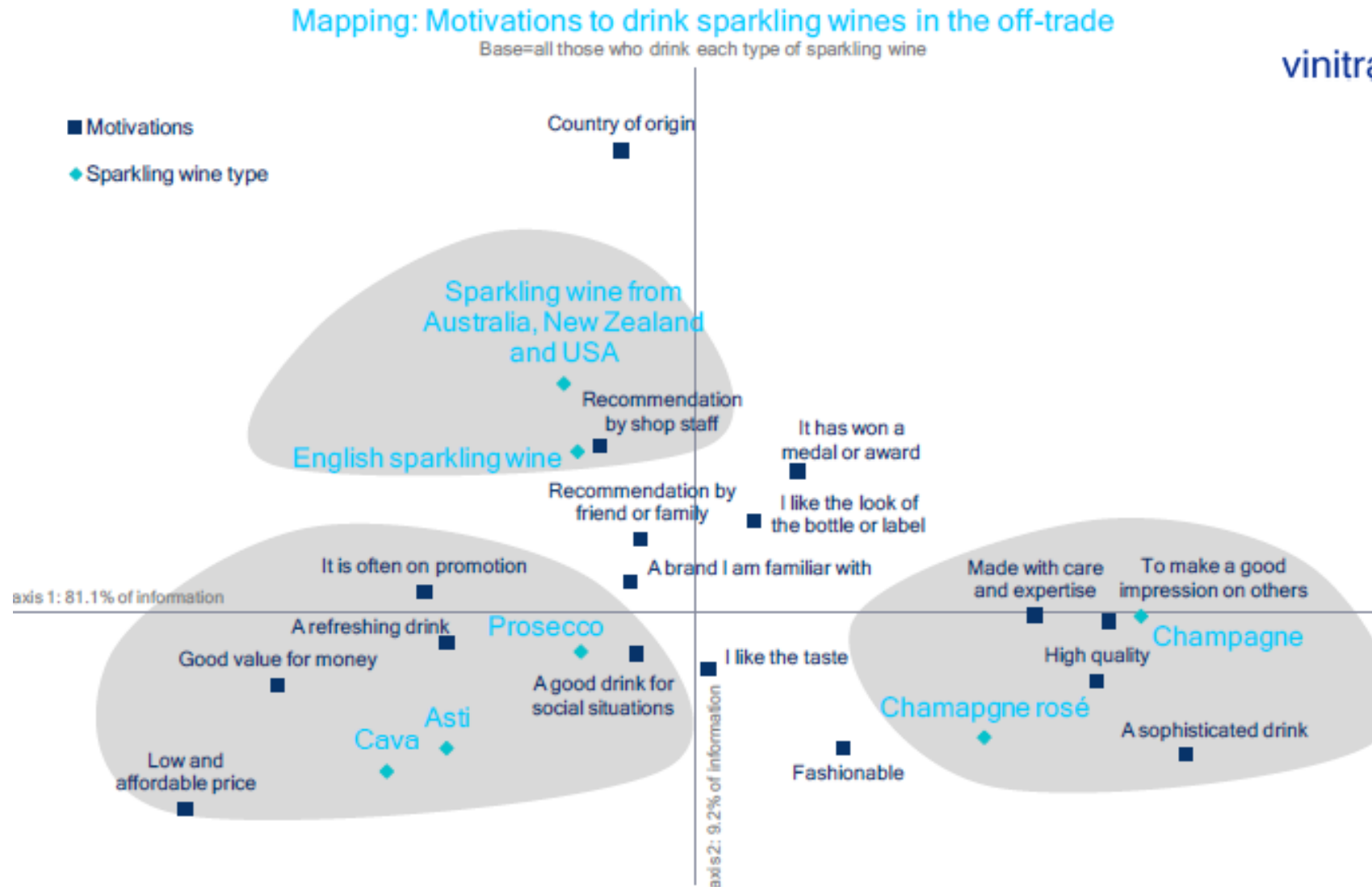
Volume size (in thousands of 9 litre cases) and growth of top 20 countries



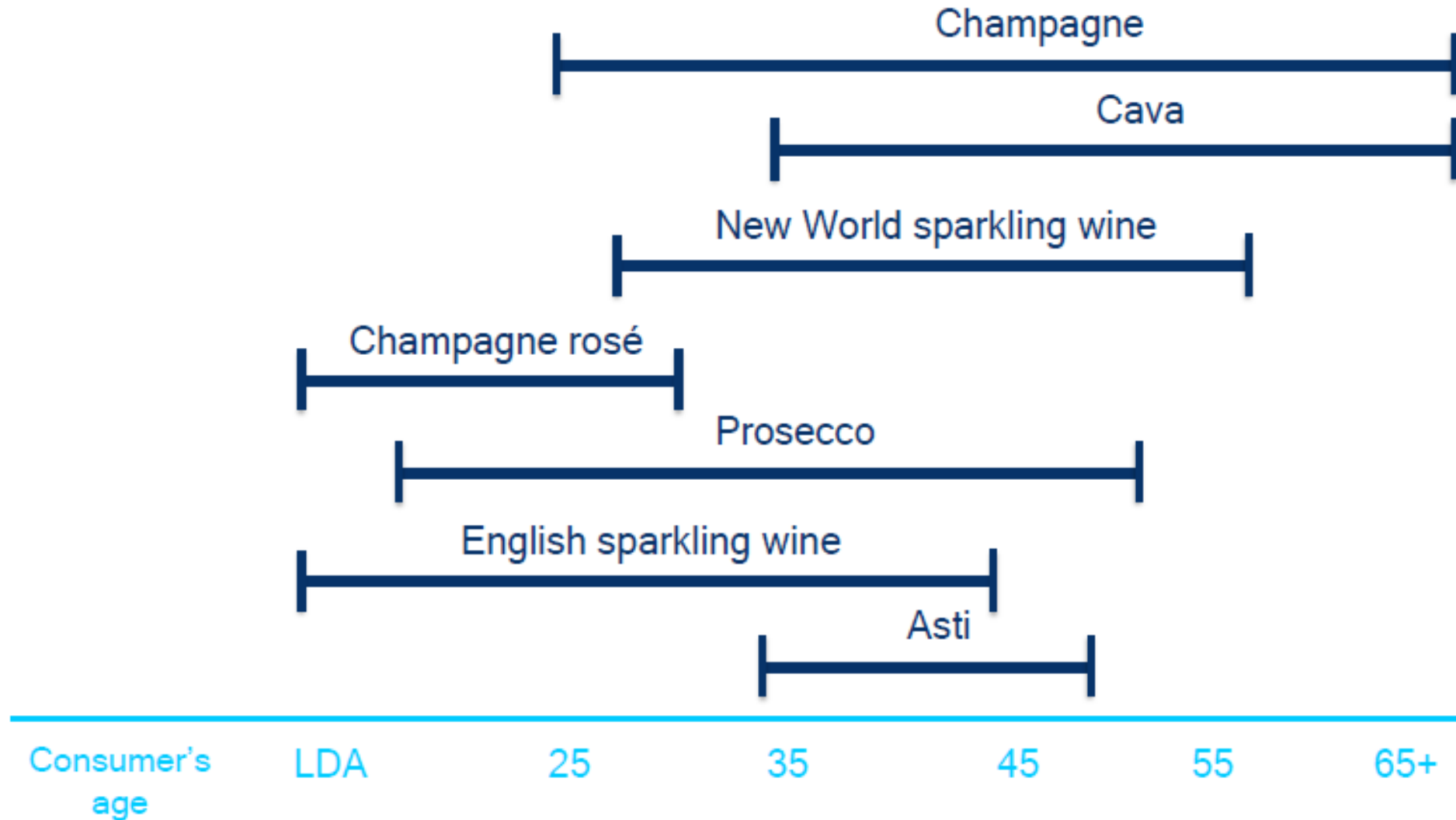
Rank	Country	Sparkling wines		
		2013 vol	CAGR 09-13	CAGR 12-13
1	Germany	46,214	1%	1%
2	France	30,628	-1%	-2%
3	Russia	26,782	4%	-2%
4	United States	17,825	5%	2%
5	United Kingdom	10,613	5%	8%
6	Italy	9,610	-4%	-2%
7	Spain	7,212	-2%	-1%
8	Ukraine	5,896	-1%	0.5%
9	Australia	5,154	-2%	-1%
10	Belgium and Luxembourg	4,649	6%	4%
11	Argentina	4,037	10%	8%
12	Japan	3,503	11%	8%
13	Brazil	3,360	7%	0%
14	Austria	2,635	1%	1%
15	Switzerland	2,030	1%	1%
16	Hungary	1,739	-5%	-5%
17	The Netherlands	1,633	4%	-1%
18	Canada	1,465	4%	0%
19	Czech Republic	1,407	1%	1%
20	Portugal	1,250	1%	1%
21	Sweden	1,182	8%	7%
22	China	1,089	37%	38%
23	South Africa	926	0%	-4%
24	Chile	912	13%	13%
25	Romania	675	-6%	-9%



Motivations to drink sparkling wine in the off-trade:



Younger drinkers drink Champagne rosé and English sparkling wine



- There is now a new segment of consumers: those who mostly drink wine with bubbles in it (mostly young and affluent)
- One in five sparkling wine drinkers (4 million people), claim to drink English sparkling wine at least once a month. This is difficult to believe, as we only produce about 5 million bottles a year.
- The future looks good!



Looking to the future

THE WINE



1. Creating a quality-focused industry

2. Building a profitable sector

3. Employment / education / training

4. Expanding wine tourism

5. Building a global brand

6. Planning for winery development

SWOT analysis of the English sparkling wine industry

Strengths

- A fine history, but no tradition
- Innovative industry
- Old World/New World
- Focus on sparkling wine
- Strong knowledge & skills base

Weaknesses

- Climate (low, irregular yields)
- Very small
- Lack of experience
- Lack of marketing identity
- High production costs

Opportunities

- Climate change & geology
- Important wine trade centre
- Strong interest in home foods & wine
- Export & wine tourism

Threats

- Risk of poor quality image?
- Limited home market for quality sparkling
- Brexit?

The English sparkling wine industry: Young, dynamic and successful





Please come and visit us!

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