

2025 Bordeaux Vintage Report from Flickinger Fine Wine:

A Unique Vintage of Richness, Freshness – and Small Quantities!



We have just returned from Bordeaux where we spent a full five days conducting countless barrel tastings and speaking to winemakers and technical directors so that we can bring you the news and our opinions on the latest vintage, in this case 2025 – with all indications pointing to this being a remarkable and singular vintage that holds significant interest for both drinkers and collectors.

We're going to start with the summary, in contrast with previous reports, with further details below should you be interested – though we would encourage you to check out our individual recommendations at the bottom of the report.

2025 is a small, high-quality vintage that is a powerful indicator of the effect that weather and the conditions of the previous vintage can have on production. Yields were very low across the region – the lowest since 1991 – as conditions in the preceding vintage damaged the vines, reducing the number of new buds, and causing the flower clusters in 2025 to be notably smaller. The situation could have been much worse, but thankfully the spring weather allowed for a near-perfect flowering and fruit set that took place very quickly. However, warm, sunny and dry conditions throughout the growing season produced grapes that were small and thick-skinned

further reducing yields. As the growing season progressed, vigneronns were concerned that they might have another 2003 on their hands (though most were hoping for something akin to 2022), but as it was, rain at the end of August added a much-needed revitalization. In fact, 2025 turned out not to be a true solar vintage since the average nighttime temperatures were close to historical norms and the wines retained outstanding freshness from the resulting low pH levels, along with retaining moderate alcohol levels thanks to the rain. The warm conditions led to a very early harvest – the second earliest on record. Finally, it is very pleasing to note that wines of all styles appear to excel in their own ways.



Vieux Chateau Certan; old vines at VCC

The reds benefitted from the fortuitously timed rain at the end of August which refreshed the vines and kept sugar levels manageable, while allowing phenolic and physiological ripeness to come together perfectly at the start of September. Acidity levels were high (and pHs low) due to cooler nights, careful canopy management in the vineyard and more thoughtful winemaking techniques – there has certainly never been a better time to make wine in Bordeaux from the point of view of technology and winemaking *savoir-fair* – and the reds in particular show the ripe, powerful fruit of the sunny season along with a vibrant freshness and alcohol levels in the 13%-13.5% range (and sometimes lower, Cheval Blanc is at 12.7%). The best wines from both banks have inner depth, tension, textural purity and supple, silky tannic structures to match the finest wines from the top vintages, while there are many bottlings underneath the top tier that offer tremendous quality at what we hope will be competitive pricing. There also seems to be distinct terroir definition from estate to estate, and to a greater extent than in other lauded vintages such as 2019.

Vigneronns across the regions are thrilled and surprised with the style of the 2025 reds, praising them for their *“buvabilité”*, balance and terrific silky textures, and the expectation is that they will age beautifully, with some providing drinking pleasure from a relatively young age thanks to

the fineness of the tannins which in some instances simply melt away into the fruit, such is their incredible integration even at this early stage.

With regards to how individual appellations performed, Margaux certainly seems to stand out; there is fantastic consistency and high quality across the board at all levels there, with the wines being especially notable for their soft, inviting textures and perfect marriage of fruit, tannin and acidity. Pauillac is close behind, with, naturally, the wines showing a little extra grip, while those from St-Julien were supple and elegant (aside from the powerhouse effort from Leoville Las Cases). We found Pessac-Leognan to be less consistent, though there are some superb efforts from several prominent estates, while in St-Emilion those chateaux commanding positions atop the limestone plateau performed particularly well. Pomerol performed well in parts, but our impression was that those properties that are closer to St-Emilion showed the best (La Conseillante and VCC are magical).

The dry whites reached full maturity in mid-August, and harvest took place then – very early as previously noted. These wines are less crystalline than the 2024s and they show beautiful aromatics that are citrus and stone fruit-driven rather than herbaceous, with creamy textures and lively acid backbones, and many will be accessible early on.

Finally, in Sauternes and Barsac the grapes ripened early and were in excellent condition, and the noble *Botrytis Cinerea* rot spread evenly and quickly following the rains in late September that permitted the morning mists to rise up the Garonne river valley and along its tributaries before receding each afternoon. The grapes ripened fully and were harvested under ideal conditions over several passes, and the wines have excellent vibrancy along with wonderful aromatics and excellent concentration. They should age very nicely while offering early appeal also – frankly, I'm a sucker for young Sauternes!



Further details about the vintage:

The weather: as always, the weather is the main factor in determining the quality of the vintage. As you know 2024 was a wet year in Bordeaux, and the soils were fully replenished with water over the course of the year. The winter of 2024/2025 was relatively mild, with above average rainfall in January, though February and March had several cold snaps and frost periods which helped delay budbreak until the first part of April (not especially early), when further rain fell. The timing of the budbreak helped guard the young growth against frost since frost events are far less likely to occur after that, and the vines were free to develop under normal conditions thereafter. From mid-May onwards the sun came out, temperatures began to climb, and the vines enjoyed near-perfect and relatively dry conditions for flowering and fruit set which was fast and even – a godsend given the small number of buds on the vines. Humidity levels remained low as did disease pressure. June was warm and sunny, though a short period of storms provided moisture and refreshment to the soils and vines, and after this period the story is all about sun! Aside from a small heatwave in early July, conditions until mid-August were benign, with warm, sunny days and normal temperatures at night; this diurnal swing helped preserve acidity in the grapes, but from August 10th-20th a significant heatwave arrived which accelerated ripeness and increased sugar levels in those vines that did not shut down. Thankfully the late-August rain provided all areas with a welcome refresh (amounts varied from 1"-2.5") which added needed juice to the berries and enabled them to achieve phenolic and physiological ripeness without sugar levels getting too high. Harvest was carried out under ideal conditions in between the late August rain and a second rain period at the end of September.

The one big downside is that yields were very low overall – in fact the region as a whole hasn't seen yields this low since 1991. Of course this does vary considerably from producer to producer; for example, at Cheval Blanc they only managed 15hl/h whereas their almost-neighbor, La Conseillante, achieved 30hl/h, and Angelus harvested 35hl/h. Most chateaux, however, fell somewhere in the 23-30hl/h range.

The cause of the low yields? This is in large part due to the shoddy conditions in the preceding 2024 vintage which left the vines with fewer buds once they were pruned back in anticipations of the 2025 season; flower clusters were small, and from the outset this was always going to be a reduced vintage. The ensuing heat over the course of the summer compounded the issue as the berries were smaller and weighed less, but thankfully it was saved from being worse by benign conditions at the most important stages in the growing season.



Vineyards of Chateau Canon, looking towards St-Emilion

Vineyard and winemaking decisions: the growing season was, certainly by comparison to some recent vintages, relatively easy – a “*deckchair vintage*” as we heard at more than one estate. Of course, the sun and heat meant that decisions had to be made in the vineyard regarding how to best protect the grapes, and most did this by retaining a high protective canopy of leaves. In addition, the now ubiquitous use of natural plantings in between the rows helps keep the soils as cool as possible, though hydric stress did occur in vines planted in soils that were better drained or in younger vines whose roots don’t yet reach the water-retaining clay or limestone subsoils. Subsequently, the main decision was the timing of harvest, with most choosing to bring in their dry whites in mid-August, the Merlot from the very end of August and the Cabernet from mid-September onwards. Some chose to harvest a week or two later, the most notable among these being Chateau Margaux who were among the last to begin and end their harvest. Mostly healthy grapes of a homogenous quality were harvested, but as is the norm these days a strict selection process took place at all of the top chateaux in order to ensure the very best possible quality for their grands vins – though at one or two places (Cheval Blanc being the prime example) yields were so low that a second wine was not produced at all.

All the talk these days in Bordeaux is about gentle extractions, or “*infusions*” as they like to call it, and given the thick skins and current trends towards more approachable wines with fresher fruit and perfumed aromatics, this was how vigneronns approached the 2025 vintage. As Thomas Duroux at Chateau Palmer explained, “*our understanding of maceration and extraction*

techniques has increased so much in the last 15 years; we're not necessarily extracting less, just more carefully." His approach seems to have worked, since Palmer is one of the best wines of the vintage! And adding to the desire for more aromatic fruit with fresher profiles, we are finding that many estates are reducing their use of new oak during *élevage* – and creeping into the cellars of the Bordelais over the past several vintages are a small number of large oak casks for ageing part of their blends, the likes of which are more commonly seen in other regions:



New barrel room with large casks at Chateau Beausejour Becot- plus the new space-age vat room at Angelus with casks and suspended vats!

The key to a successful campaign is pricing: in order to engage with customers and offer perceived value, chateau owners need to be realistic about the market as it stands now along with all the current headwinds that the global economy faces, particularly with regards to the current crises in the Middle East and eastern Europe and the continued economic uncertainty across the globe. Signs of recovery in the fine wine market are becoming more apparent as a gradual uptick in demand continues, and the chateaux have a golden opportunity to turn the heads of consumers towards their region and provide impetus to a market that could certainly use it. Small quantities and a high-quality vintage can certainly provide this opportunity if the pricing is correct. Feedback has been given to the chateaux by negociants and merchants as usual, but whether they decide to act on it remains to be seen, and we will be making our recommendations on each release as they come – beginning with Pontet Canet on Wednesday April 29th.



Chateau Smith Haut Lafitte looking radiant; sadly, the wines weren't showing as beautifully during our tasting

Our recommendations, based on quality with pricing TBD of course (this list is by no means exhaustive, and we will make recommendations on all wines as they are released):

St-Estephe: Montrose, Calon Segur, Lafon Rochet

Pauillac: Lafite, Pichon Lalande, Pontet Canet

St-Julien: Leoville Las Cases, Leoville Barton, Ducru-Beaucaillou

Margaux: Margaux, Palmer, Rauzan Segla, Brane Cantenac, Giscours, Siran

Pessac-Leognan: Haut-Brion, Les Carmes Haut-Brion, Haut-Bailly, Haut-Bergey

St-Emilion: Canon, Cheval Blanc, Beausejour Becot, La Clotte

Pomerol: La Conseillante, Vieux Chateau Certan

Dry whites: Domaine de Chevalier, Malartic-Lagraviere, Suduiraut Vin Blanc Vieilles Vignes

Sauternes/Barsac: Coutet, Suduiraut, de Fargues

Congratulations on making it this far! Hopefully you have gained some insight into the 2025 vintage which will help inform your purchases, and as ever, please get in contact with either Alastair Bullett (alastair@flickwine.com) or Jason Palma (jason@flickwine.com) if you have any questions.

Finally, please see below for a few images from our trip!



Calon Segur – first stop on day one.



New winery at Leoville Las Cases, opened to the public this year though it has been in use for a couple of vintages.



La Place de la Bourse at sunrise on an early morning run..



Leoville Barton celebrating 200 years of family ownership; their new winery.



Early morning at La Mission Haut-Brion; horses working the fields at Pontet Canet; painted vats at Les Carmes Haut-Brion (below).



Chateau d'Yquem:

