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VINTAGE AND MARKET REPORT

BORDEAUX

THE 1974 VINTAGE

Quantity

The 1974 vintage produced:

- 2.2 million hectolitres Appellation Contrôlée Red
- 1.1 million hectolitres Appellation Contrôlée White
- 0.7 million hectolitres Vin Ordinaire Red
- 1.4 million hectolitres Vin Ordinaire White

A total of 5.4 million hectolitres, rather less than 1973, much the same as 1970 and about 30% more than what can be considered an average crop. That makes three out of the last five vintages that have produced some 30% more than 'average', which just about gives a bonus issue of an entire crop in the last five years. Before accusations of over-production are levied, it is worth calculating that even in highly generous years such as 1974 the average yield in the area, including wine without Appellation, works out at barely 54 hectolitres to the hectare. This can hardly be considered grotesque over-production.

Quality

1974 was less warm than 1973 but rather drier. The weather was also better balanced. It neither had the high rainfall in July nor the excessive heat in August that had characterized the previous summer. It was, until the 29th of August, one of the driest summers on record — a total of only 54 millimetres of rain from the 1st June until the 28th August. Rainfall on the single day of 29th August amounted to 30 millimetres, and sadly 128 millimetres fell in September, most of it in the second half of the month during the picking. But by then, the grapes were ripe. The rain diluted the must inevitably but happily it was accompanied by a remarkable drop in temperature, which during the last ten days of September was on average no less than 5 degrees below that of the previous three weeks. The drop in temperature prevented rot from developing, the grapes remained healthy, they were ripe and suffered less than those who had to pick them, from the miserable vintage weather.

At the time, nobody dared hope that the quality would be more than rather ordinary. Picking in the rain is not good for morale. As it turns out, it was probably only 100 millimetres or so of rain that prevented 1974 from being a very good year indeed. There are the inevitable failures due to local over-production or bad vinification but there is no shortage of wines with a remarkable dark, healthy colour, which are well structured and which will certainly develop character. Their weakness is a certain lack of fruit, or 'middle fat', due no doubt to the diluting vintage rain which at the last moment swelled the grapes and consequently stretched the wine.

It is wrong either to compare or generalise but — to do both — 1974 is, at this early stage, reminiscent of the 1967 vintage. Under different circumstances, thoroughly useful wines and no doubt one day they will be wanted. Today, they are the unwanted orphans of a shattered market place.

It must have been in 1971 that the buyers of the Swedish Wine Monopoly on a visit to the area, warned the Bordelais that if prices continued to rise many of the traditional markets would be lost. They suggested that if Bordeaux wanted to retain these markets, it was essential that wine be made available at stable prices, even if there were markets that were willing to pay more. At that time, Bordeaux was still only regaining a degree of confidence. For ten years prices had been only stable — but at least they were at a level that made the production of fine wine viable, which it had not been for some thirty years before 1959. It had not been viable because the market, traditional or not, had not been willing to pay a price sufficient to make it so. It became viable because the frosts of 1956 resulted in a series of small crops that created a shortage, and possibly to a limited extent because this coincided with an emerging interest in wine in the U.S.A. Having suffered the consequences of an entirely free market based on supply and demand, it was unlikely that much notice would be taken of the entirely reasonable suggestions of the Swedes. The game had always been ruthless; 1970s had been traded and retraded within months of the harvest at prices which rapidly became double those at which the grower had sold, and they were being plagued with offers of fabulous results if only they would see the light and give their exclusive distribution to somebody who understood modern marketing methods, who could create a stable demand for their wine and who could do so much more for them than anybody else. So, of course, nobody listened to the Swedes, the bidding continued and as everybody knows, it topped out with the 1972s, which were marketed at prices that were absurd by any standards. Such exaggeration was bound to have consequences (see our report of February 1973) but nobody could have anticipated just how vicious the backlash would be. It was triggered by the unpredictable influences of high interest rates, a world economy rocked by the energy crisis and Nature stepping in with two quite exceptionally large consecutive crops, flooding the market when the market would have preferred a drought. But not even these exceptional circumstances would have created the present chaos unless the market had been already far sicker than anybody suspected.

Speculation is not new to the Bordeaux market. It has been part of the game. It has consisted mainly of Bordeaux shippers backing their judgement of a vintage they consider under-valued, growers and shippers playing cat and mouse during the 1950s when prices were so low that, in order to pay their production costs, growers were obliged to sell part of the crop before the vintage and consumer enthusiasts laying down cellars of fine wine which they had chosen or which their wine merchant had recommended for them to enjoy five, ten or twenty years later. What has changed is that it became a big money game. Nobody realised to what extent the whole market had become dominated by companies new to the fine wine business, with apparently unlimited resources at their disposal, who had been buying quantities far greater than they could reasonably hope to sell at prices that were apparently far higher than consumers would pay. It would have been reasonable to hope that such companies would have had the strength to provide some much needed stability to the market. But instead, having bid prices up to enormous heights it is now they who are leading the dumping operations.

Bordeaux growers are no greedier than anybody else. They never understood why all of a sudden people had been hammering at their door, offering prices far higher than they had ever dreamed of, and they were no more likely to refuse such offers than anybody else. Most are excellent farmers, they can easily satisfy themselves that their vines are as well tended as those of their neighbour but when it comes to selling their wine the yardstick remains the same — 'what did M. Dupin down the road get?' They might be naive but the message has got through that success is measured in money. Worse, a large majority pay taxes not on their real profits but what the inspector calculates their profit would have been if they had sold their entire crop at the average price of the vintage during the following twelve months. So if they don't get that price they find themselves paying tax on profits they never made. They are also aware that aided by classifications, appellations and all the other well-intending bureaucratic paraphernalia, an artificial world has been created around them and that they are tied up in the commercialising of images as much as in the making of wine. They are frightened of letting go of the image factor because selling an image is apparently more rewarding than selling wine. People buy names, and for some reason some names fetch higher prices than others. Then those names are traded, up and down, back and forth across the Atlantic and as the result of all this the 'value' of his wine can go up four times and fall back again from where it started, all within a period of thirty short months. He knows his cost of production has increased enormously and what he needs to know before deciding to plant more

vines, or pull up those he has, is what the right price is. He also wants to organise the marketing of his wine in such a way that it is he who reaps a just reward, and not speculators who create havoc, turn the consumer against him and contribute nothing to the sale of his wine.

What are the price levels at which it is possible to reconcile the interest of producer and consumer? Bordeaux Rouge and Bordeaux Supérieur account for about 50% of the production of all red Bordeaux wine. Although exports have increased by some 30% since 1970 they have in no way made up for the drop of over 55% on the home market because in 1971 80% of these wines were consumed in France. In other words, an increase of some 30,000 hectos in exports cannot balance a drop of 230,000 hectos in France. To reclaim its essential share of the French market, which it has lost largely to VDQS wines and Côtes du Rhône, these wines must reach the consumer at under Frs. 5 per bottle (instead of an average of over Frs. 7 in the Paris area in 1973/74). This means a price ex vineyard of about Frs. 1,700 per tonneau. At this level the grower can just scrape a living so long as he produces an average 50 hectolitres to the hectare. He can certainly not afford to be over fussy about quality at this price level but exporters, picking the cream of the crop, should be able to get good wine to the consumer in the UK from about £1 per bottle and in the USA from about \$3.

Médoc, St. Emilion and its satellites, make up a further 25% of the production but of these, roughly 70% of sales are to export markets. It does not cost that much more to produce generic quality St Emilion than it does Bordeaux. Médoc costs more because the yield is lower. However, the foreign consumer rightly expects wine of higher quality from these areas, and is not (or rather, should not be) willing to pay more just because the label bears a fancier 'appellation'. So the problem becomes quite different and the grower should be obliged to make sacrifices of quantity in the interests of quality. Otherwise, there is no reason for him to expect a higher price. Merchants too should be willing to pay more for quality and not just sell labels. The sacrifice of quantity must vary considerably, depending on climatic conditions but very roughly over a period this might represent a loss of about 30% in yield, which needs a price premium of about 50%. This should get good Médoc and St Emilion, with the year of bottle age it should have, to the UK consumer at about £1.60 and to the American consumer at about \$4. The rest of the production consists mainly of top quality communes of the Médoc, Pomerol and parts of Graves. They should be fine individual wines, matured in oak casks for eighteen months and then in bottle for at least four years. Elimination of poor vats should be strict and sometimes whole vintages declassified. Prices to the consumer, if the job is to be done properly, must range from about £2.00 (\$5.00 in the USA) for less prestigious but good bourgeois to perhaps £6 (\$15) for first growths, when they are first marketed with a few years in bottle but still well short of their prime.

Of the white wine production well over 80% consists of basic Bordeaux Blanc or its equivalent and 70% of the sales of these wines are either consumed in France or go to Germany. Prices have remained pathetically stable over the years, in spite of very real progress in vinification. The restrictions on yield and minimum alcohol content are absurd and it is time the French authorities showed a similar liberalism as the Germans and at least allowed a much greater yield for white wine than red. To compete and make ends meet it is necessary to produce at least 70 hectolitres to the hectare, and this can be done without any drop of quality — if quality is no longer judged according to alcohol content. Another lesson to be learned from Germany concerns the production of sweet wine. The French legislation puts the Sauternes grower into the impossible position of having to produce sweet wine, even against weather conditions. If he doesn't, his wine can only be called Bordeaux Supérieur. It is all or nothing, growers inevitably aim for 'all' and often end up with 'nothing', producing a quality that is not worthy of the great wines with which the appellation should be synonymous. The German system is better with a hierarchy of sweetness and a district name that identifies only the origin rather than describing a type of wine, that can in fact only be made successfully when weather conditions are ideal, perhaps one year in three. Natural sweet wine must be expensive, it should only be made if it can be made well and it would have to retail from about £3 (\$7) — which nobody who has seen fine sweet wine being made could consider expensive.

As it is well-known prices at retail level are today often below those mentioned above. This is because of cash flow problems, overstocking following panic buying in 1973, and dumping. The kick-back reaction has been to force vineyard prices also below an economic level. The hay days are over and Bordeaux has learned that prices go up when there is a shortage and down when there

is a surplus, that it is up to them to regulate the flow of wine onto the market at a price which reconciles the ability of the consumer to buy with that necessary for the grower to produce. If Bordeaux cannot organise their own market in this way, speculators will continue to do it for them.

Organising the market is in the end a matter of financing stock — a problem not easy to resolve in a land of artisans and made more difficult by current interest rates. Because of its long tradition and experience Bordeaux has a head start on the modern wine growing areas of California, South Africa and Australia. The marriage of grape varieties to soil and vinification methods has been consummated and a unique character created and recognized. But that same tradition is a handicap when it comes to effective marketing. A tiny proportion of the production consists of Château names with consumer recognition which can be considered as brands. Part of the success of these brands has been quality, part image. The image factor being linked with that of a highly individual product, produced in limited quantities and put on the open market soon after being made, and many years before they are ready to drink. The modern way of dealing with such a product is to ascertain the price the consumer is willing to pay to drink it, and only allow such quantities onto the market, as it can absorb at that established price level. No wine would be put on the market before it was ready to drink. Château Latour has shown the way by not yet marketing their 1973, perhaps others will follow but it requires immense finance facilities. This could be overcome by such properties producing several qualities of wine — to be marketed under different labels of course — some made for early drinking and providing turnover to cover the expense of maturing the 'top brand'. Below this élite, and those who might have the quality and financial resources to join it, the production consists of a mass of individual growers with an average area of about 7 acres. The wine has no defined identification as far as the market is concerned other than that of a geographic origin defined by the appellation contrôlée regulations, which is sometimes taken for a hierarchy of quality. They each also have the right to a château name. They therefore benefit from the image of the great châteaux but usually have neither the quality nor sufficient production to gain consumer recognition. Some do reach the consumer with a château name on the label, others lose their individual identity in shippers' blends created to supply the quantity and quality needed to give continuity and satisfaction to the consumer. It seems time that the former lost their rather artificial personality and that the latter were consolidated into brands, owned by powerful groups, advertised and joined the rest of consumer goods in a new world. Sad in many ways but this is not an age of individuality and romance but one of power, standard products and mass marketing.* Of course, there will always be individualists catering for a small minority of real wine enthusiasts — but there are not enough of them to absorb the 4 to 5 million hectolitres produced in Bordeaux each year, and Bordeaux must find a regular outlet to the mass market. Speculation and artificial market conditions are less likely to develop with demand centred around a few well established brands whose owners will be in a strong position to negotiate long term supply contracts with growers and which will be strong enough to withstand dumping operations even if they do continue to occur — as to some extent they are almost bound to do with an agricultural product whose size and quality of crop cannot be regulated to correspond with demand. In short, the money that has been going into the pockets of speculators would be better spent if harnessed by the Bordeaux Trade and used to both regulate the market and communicate with the consumer through 'brand' merchandising.

If this is the shape of things to come, it will not happen overnight and in the meantime Bordeaux is struggling for oxygen. Stocks financed at 15% are sometimes worth only half of their purchase price, cellars are full and what activity there is, is restricted to the cheapest wines. Prices for these are below subsistence level, costs are rising and even if Nature re-establishes a balance and absorbs the bonus crop with one or two small ones, there seems little hope of an appreciable increase in prices during the next eighteen months. Serious for those dependent on their Bordeaux

*Even those of us who enjoy being in the business because of the pleasure of dealing in individual wines are forced to recognize that the market place has changed considerably since in 1889 Edward Sheldon of Shipston-on-Stour could put out a list of Sauternes as follows:

Good Sauternes	Per dozen 21/-
Fine Sauternes	„ 24/-
Ditto Do	„ 28/-
Superior Sauternes	„ 30/-
Very Superior Ditto	„ 42/-
Ditto Do Ditto old in bottle	„ 56/-

Incidentally, payment conditions were six months credit with 2.5% discount for immediate payment.

Trade, this must be good, long term, for the market as a whole. Stability was what we wanted and stability we have. Speculators will turn their attentions elsewhere and the stocks they are dumping are providing a bonanza for claret enthusiasts and perhaps will tempt many new ones to the fold. At last it is again possible to have a dynamic approach to increasing sales instead of being wary about selling stock because of the difficulty of replacement. The elephantine entry of big money into the Bordeaux country circus will certainly not easily be forgotten. Some traditional performers will certainly be crushed, but the vines will continue to produce grapes, dedicated people will defy the economists by continuing to make good wine and ultimately no doubt commerce will find a way of adapting one of the better things of life to the fluctuating moods of a high powered economy more concerned with productivity than the product.

1973

Getting ready for the bottle, they are on the light side but soft and graceful wines with no edges. Those that were too light will generally not reach consumers under their château name and the vintage will provide pleasing soft wines which will probably be at their best between 1978 and 1984.

1972

It is nice to think of the truly wise chuckling in a few years' time over a glass of good 1972 and swapping stories of how they bought the wine for nothing. Truly, the vintage with which the Wine Trade made fools of themselves. Bought blind at ridiculously high prices, tasted and found high in acidity and now being dumped as though they were faulty merchandise. Whilst these commercial acrobatics have been going on the wines, sedate in their bottle, have been developing as they were destined to do. They have shed their acidity: are developing excellent character, have balance and from 1978 or so will provide fine drinking. It is to be hoped that those retailers who are already offering them to an often unsuspecting public are explaining that they are doing so because of financial pressure but that of course fine Bordeaux, particularly of a vintage such as 1972, needs time in bottle to mature and that they are not yet ready for drinking.

1971

We disagree with those who say they should be drunk before 1970s. They appear lighter because they have less fruit but they have a length which signifies long life and exceptional elegance. In a recent tasting of the 1970 and 1971 vintages of some thirty top châteaux, the three most outstanding wines were all 1971s — Haut Brion, Petrus and Cheval Blanc (so perhaps classifications mean something after all). A very good year indeed and the top châteaux will certainly still be full of life in the late 1980s.

1970

Warm, fat and seductive, a vintage that was instantly recognized as good and which is living up to its reputation. Those who enjoy splitting hairs will be able to compare them with 1971s for years to come, like 1928 and 1929s. We think 1971 has more elegance but there are châteaux too where 1970 is better — in St Emilion particularly, but also sometimes in the Médoc (Mouton is an example). There are also those where it is the 1970 that has the elegance and 1971 the body (Brane Cantenac). Plenty of fun to be had by all.

1969

Sometimes developing a little character but fine wine cannot be made with rotten grapes. Not a good year but the adventurous may find some worthwhile bottles.

1967

Not exciting but sound clean wines that lack middle fat. St Emilions are often now at their best and it is also time to start drinking the Médocs, though many will probably be even better towards the end of the decade.

1966

A great year. Entirely straight forward with the extraordinary elegance that sets fine claret apart from any other wine. Anybody who wants to study the different characteristics of communes should use 1966s as their basis. Developing well, it is a pity to drink the finer Médocs yet. Warm up on St Emilion and lesser châteaux in preparation for the great Médocs which will be at their best in the 1980s.

1964

Uneven but some are developing character and finding balance. They tend to lack length but some are now pleasing and the best will no doubt continue to improve for five years or so. St. Emilion and Pomerol are more regular than the Médocs and are generally now at their best.

1962

If there were any available, certainly the fine claret vintage for drinking now. Delightful wines which have not yet developed the flavour of old wine but which have all the lively elegance of fine claret in its prime.

1961

A freak year that produced freak wines. They are more of a concentrate or essence than wine. Certainly one of the very great years but the best Médocs should not be drunk until the mid 1980s and should still be bright eyed to see in the new century.

OLDER VINTAGES

1960s want drinking. 1959 St Emilions are at or passing their best but the Médocs still want time. They will be very good. Still look out for 1958s — there are some very pleasing bottles for drinking now. 1957s continue to soften, they might not be great charmers but those who like claret for its character will enjoy them. 1955s and 1953s are at their best. 1952 remains disappointing — though there are some good St Emilions and Pomerols. The Médocs will probably come around eventually too. They are certainly not fading.

BURGUNDY

Beaujolais-Mâconnais

Another large crop of red wine with over a million hectolitres being declared of Beaujolais. As in 1973, the quality varies considerably, as it is bound to do in years of high yield. The best have more colour than 1973, are firmer wines, larger in skeleton but perhaps with less fruit. At the other end of the scale, they are barely sufficient for quaffing very young in a Lyon Bistro and are certainly quite unsuitable for export. Prices are down to below 1971 level — though of course both the dollar and sterling were stronger then. It is to be hoped that importers will not struggle too hard to keep prices down unreasonably, sacrificing quality to weaker currencies. Quality varies even more than prices. Beaujolais has retrieved some of the market it lost due to the high prices and unsuitable quality of 1972, stocks of quality wines are not high and we would expect prices to move up again in the case of a crop that is no more than average in size.

It was only an average white crop with 104,000 hectos of Mâcon and 33,000 of Pouilly Fuissé. The quality is good. Pouilly Fuissé prices have collapsed almost as sensationally as Bordeaux reds. Greatly dependent on the American market, shipments came virtually to a halt during 1974 whilst the country tried to digest its massive purchases the previous year. The future must depend on whether some Pouilly Fuissé enthusiasts have discovered that Mâcon Villages can also be very good. If demand can be spread sensibly over the two wines, prices will remain stable. If consumers are willing to pay twice as much for Pouilly Fuissé as for Mâcon, growers will no doubt be pleased to oblige.

Chablis

A good sized crop of 50,000 hectolitres. There was some rot and the quality will probably be rather less good than 1973. What will happen to prices? It will be the test of whether the discipline of price stability pays the grower or not. They have made real effort and sacrifice in recent years to keep prices reasonably stable and in the next months it will perhaps become clear whether this has been worthwhile. Have sales at retail level benefited from it or will the lesson that growers learn be that stability means when others put their prices up you don't, but when others bring their prices down you must follow suit! If the latter proves to be the case, there will be no holding them at the next frost.

Côte d'Or

Not a large crop. With 171,000 hectolitres of Appellation Red and 45,000 A.C. White, it was a smaller crop than 1973, 1972 or 1970. With 6,500 hectares in production this gives a modest yield of some 33 hectolitres to the hectare. Of the total of 216,000 hectos, some 66,000 are basic A.Cs such as Bourgogne Rouge and Blanc, Passe-Tous-Grains etc. This leaves only 150,000 hectolitres for the whole world of the great Appellations. This is about half what St Emilion produces alone.

The quality is a little disappointing in view of the reasonable yield and fine weather up to the vintage. The colour is often better than in 1973, the wines have flavour and are clean but seem a little hollow. They will be good but the incessant rain during the vintage has robbed them of the warmth and generosity essential to first class Burgundy.

If six consecutive years of at least good quality, including three well above average in size, could not put a brake on rising Burgundy prices, nothing could. Aided by the same economic situation as Bordeaux — high interest rates, overstocking in the USA halting shipments to that market, economic depression — this exceptional series of good vintages has not only halted the rise but has obliged prices to take several steps down. Those communes particularly dependent on the American market (Pommard, above all) have had their pride hurt with a more severe drop, though others, still in short supply, (Puligny Montrachet and Nuits St Georges particularly) have remained relatively firm. This tendency for prices to ease is almost bound to be temporary. It has needed an extraordinary series of exceptional circumstances to get the brake on at all, and we would expect that one small or unsatisfactory crop and resumption of reasonable business in the USA to quickly restore confidence and prices. The rise in Burgundy has not been meteoric or unreasoned as in Bordeaux and the total quantity produced is so small that it can not at any stage have been far from its 'right' price. Certainly some dumping is going on but it is illogical and probably comes either from companies with very severe cash flow problems or large companies who have issued a general edict to 'get rid of wine stocks', without bothering to worry about the relative merits of each case. Fine Burgundy is anyway not suited to mass distribution techniques. The small quantity precludes it. Big companies have great difficulty in adapting themselves to deal with small parcels of fine wine. That is why there will always be room for the small individualists catering for the requirements of what will certainly be a growing number of knowledgeable enthusiasts. Now that the big companies seem to have realized that there are certain types of business to which they are not suited, more stock should become available to the enthusiastic smaller merchant. There is certainly no category of wine in which they can practice their art with more relish and success.

RHONE

A total crop of 1.5 million hectolitres, of which 1.2 million is generic Côtes du Rhône and 80,000 Châteauneuf-du-Pape. There is a large variation of quality, particularly in generic Côtes du Rhône, and much of it is not suitable for export. The supply/demand ratio is satisfactory in that the crop of Côtes du Rhône balances well last year's sales of just over 1 million hectolitres. A small crop would immediately create difficulties and business has been brisk with negociants buying up the best wines of the vintage so that they can face a failure, in either quantity or quality, from this year's vintage. Prices have remained reasonable and stable but a premium of over 30% is rightly being paid for wines of quality.

The Châteauneuf-du-Pape picture is different. Largely exported, and particularly to the USA, sales have suffered as the result of unreasonable price increases, overstocking and consumer resistance. Sales reached a peak in the 71/72 campaign at 94,000 hectolitres, this was followed by a small crop in 1972 of only 71,000 hectolitres and no doubt growers saw themselves running out of wine. Prices rose and sales fell to 49,000 hectos. With two large crops in 1973 and 1974, stocks have been re-established and prices have fallen back almost to the level of the 1970s. We would expect to see sales quickly re-established and, if the 1975 crop is below average, prices to rise. Good Châteauneuf-du-Pape is very good value.

CONCLUSION

Growing demand followed by a small crop in 1971 set prices moving up, often unreasonably. Speculation accentuated the movement. A large crop in 1973 took the pressure off, prices began to ease. High interest rates, overstocking during the period of rising prices, another large crop in 1974 set prices tumbling. Dumping accentuated that movement.

France is no longer short of wine and has become very conscious of the fact that competition is fierce. Much has been learned concerning the importance of price stability and the vulnerability of growers and shippers if the market is left too free and regulated by speculators who today often have large sums of money at their disposal and can cause chaos in the artisan economy of fine wine. Efforts are being made, in Bordeaux particularly, to create the necessary funds to regulate the market internally, to adjust supply to demand, and to adapt marketing techniques to the times in which we live.

Consumers have not stopped drinking French wine and if as a result of the increase in prices they had become acquainted with wines they did not previously know, it can only be a good thing. Much of the recent difficulty has been created through the demand, in non European countries particularly, being centred on a few prestigious wines available in small quantities. It was impossible for the market to supply in sufficient quantity so prices increased, pulling other prices up in their slipstream. Perhaps a better balance in demand will now be found.

This is essential if the much sought after stability is to be maintained. Nature will balance those two consecutive large crops, and five consecutive quality crops, sooner or later. In these first days of April, it is easy to have the feeling that She has already decided the moment has come. Usually at Easter time in Bordeaux it is possible for at least the brave to enjoy (?) their first swim of the year. This year, after a mild winter and with the Merlot already in bud (and sometimes in timorous leaf) it has been snowing. Stocks of most appellations are sufficient to absorb a small crop but if the production of fine wines is to continue it must be hoped that price levels can be re-established that are acceptable to both grower and consumer.

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